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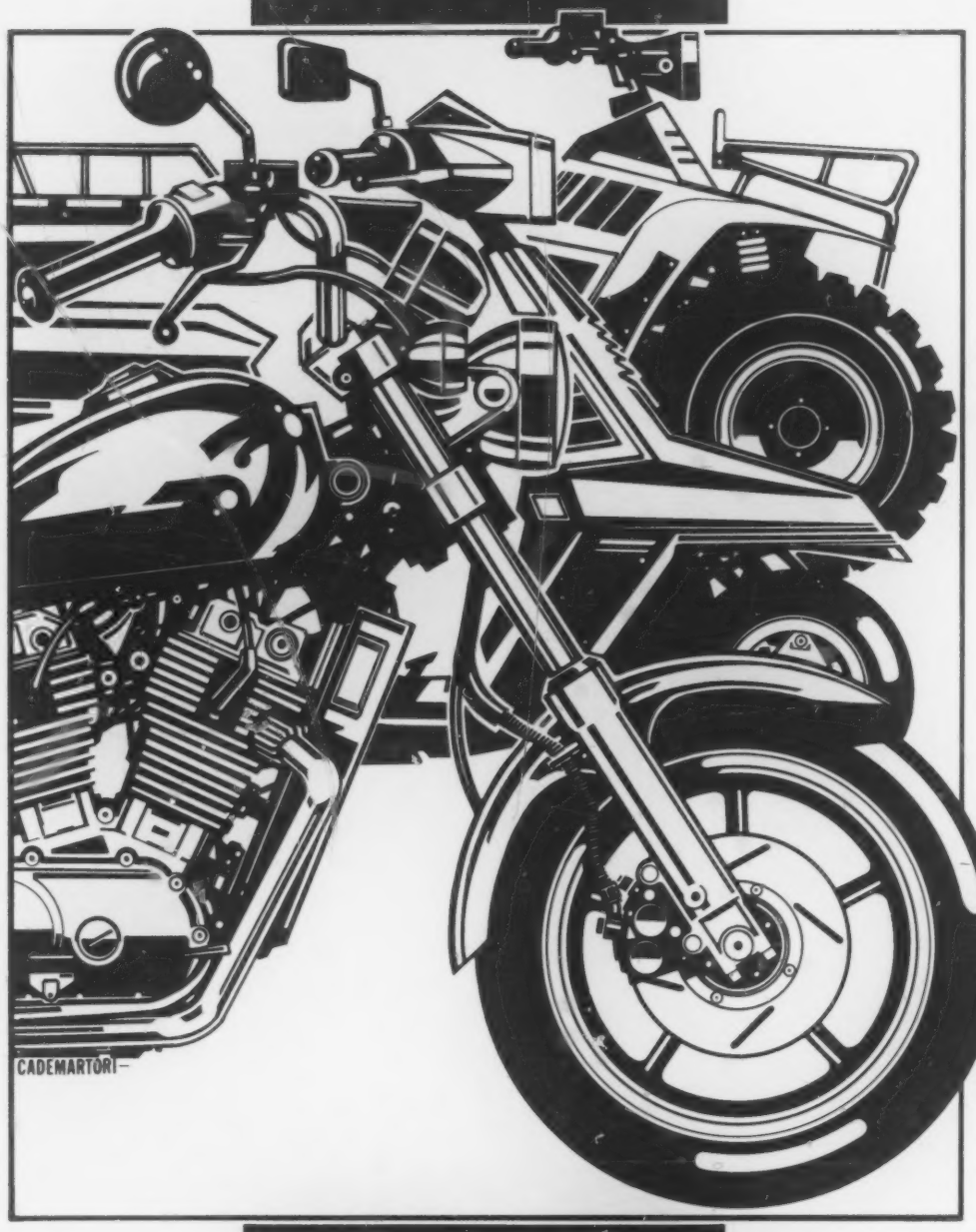
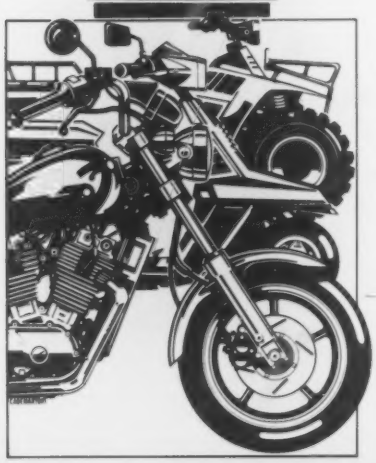
1991 MOTORCYCLE STATISTICAL ANNUAL



MIC

1991 MOTORCYCLE STATISTICAL ANNUAL



MIC

Compiled and edited by the
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The cooperation of the many contributors to this annual is gratefully acknowledged. The source note below each table credits the various government and private organizations which have provided information for the Statistical Annual.

Cover and section illustrations by Hector Cademartori.

Additional copies may be obtained from the MIC Executive or Government Relations office.

MOTORCYCLE
INDUSTRY
COUNCIL, INC.

Motorcycling continues to be a popular recreational activity and source of transportation. An estimated 31 million people operated a motorcycle, scooter, or ATV in the past year, which is comparable to participation in other recreational activities such as camping (42 million), fishing (40 million), and golf (23 million). Motorcycles, scooters, and ATVs are also used by industry and government agencies in such varied applications as agriculture, law enforcement and land resource management.

There are currently about 7.3 million motorcycles, scooters, and ATVs operating in the U.S. Motorcycles and scooters represent over two thirds (69%) of the vehicle population while three and four-wheeled all-terrain vehicles (ATVs) make up the remaining one third (31%). The motorcycle industry generated about 7.0 billion dollars in consumer sales and services, state taxes, and licensing fees in 1990.

Approximately 462,000 motorcycles, scooters, and ATVs were sold new in 1990 at an estimated value of 1.8 billion dollars. Off-highway motorcycles and ATVs accounted for half (50%) of total retail sales while on-highway motorcycles and scooters made up the remaining 50%. Six major distributors accounted for roughly 99% of the annual motorcycle, scooter, and ATV retail sales.

In 1990 the motorcycle industry supported over 9,600 retail outlets selling either new vehicles or specializing in motorcycle related services, parts, and accessories. These outlets employed over 46,000 people at an estimated annual payroll of $756 million. In the last several years many motorcycle retailers have expanded their business to include other products such as snowmobiles, personal watercraft, or other power products.

In 1987 the MIC launched a long term public awareness campaign, "Discover Today's Motorcycling", to stimulate greater interest, involvement and understanding of motorcycling among the general public. The MIC also sponsors a public service program to encourage motorcycle rider responsibility in noise reduction and environmental protection.

The MIC actively works with state and Federal government agencies to encourage intelligent land planning and management. MIC endorses multiple use, which is equitable to all outdoorsmen, including those who ride the 3.8 million motorcycles and ATVs used for off-highway recreation. The MIC has joined the U.S. Forest Service in its "Tread Lightly" campaign, an environmental awareness program aimed toward motorized recreationists.

Motorcycles in the 1990's are cleaner in terms of air pollutants than motorcycles in the past. National exhaust emission controls for new motorcycles began in 1978. Although motorcycles contributed less than 1 percent of the total hydrocarbon emissions nationwide before controls, the motorcycle industry supported the adoption of uniform national standards to regulate exhaust emissions.

The motorcycle industry's continuing commitment to reduce sound levels in our environment has been demonstrated by the production of quiet motorcycles and aftermarket exhaust systems. Many new models are as quiet as new automobiles. With the support of the industry, the U.S. Environmental Protection Agency set uniform national noise standards for new motorcycles and mopeds produced after 1981. MIC actively assists noise enforcement authorities in cost-efficient programs for motorcycle noise control.

The information in this publication has been gathered to provide a comprehensive source of motorcycle statistics. We welcome your comments for future editions.

The Motorcycle Industry Council is a nonprofit, national trade association of over 100 members, representing manufacturers and distributors of motorcycles, all-terrain vehicles, scooters, parts and accessories and members of allied trades. While the MIC name was founded in 1969, the association has existed under other names since 1914. In addition to the Irvine, California office, the MIC maintains a Government Relations office in the Washington D.C. area.

The MIC provides assistance and information to our members, the motorcycle industry in general, government officials and the public. The staff takes positive action on legislative and public issues affecting the interests of our industry. Through membership dues, the MIC supports activities in Government Relations, Public Awareness, Statistics, Land Use, and Technical and Aftermarket programs.

Other publications and materials available through the MIC include:

- **Information Kit on Helmet Effectiveness, 1990**
- **Off-Highway Motorcycle and All-Terrain Vehicle Stationary Sound Test Manual, 1991**
- **Publications for Off-Highway Vehicle Land Management and Planning**
- **"Volunteer Trail Riders in the National Forests," Videotape Presentation**
- **"Motorcycle Noise — Off-Highway Enforcement," Videotape Presentation**
- **Federal Equipment Standards for Motorcycles Summary Booklet, 1991**
- **Federal Motor Vehicle Safety Standards for Motorcycles Subscription Service**
- **State On-Highway Motorcycle Equipment Requirements Chart**
- **State Off Highway Motorcycle Requirements Chart**
- **Discover Today's Motorcycling "Straight Facts" informational brochures: Prepare to Ride, What to Buy, How to Insure, and How to Finance**
- **Discover Today's Motorcycling Public Awareness Information Kit**

MOTORCYCLE INDUSTRY COUNCIL MEMBERSHIP
September, 1991

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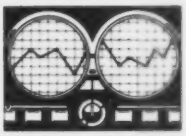

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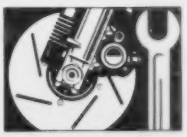

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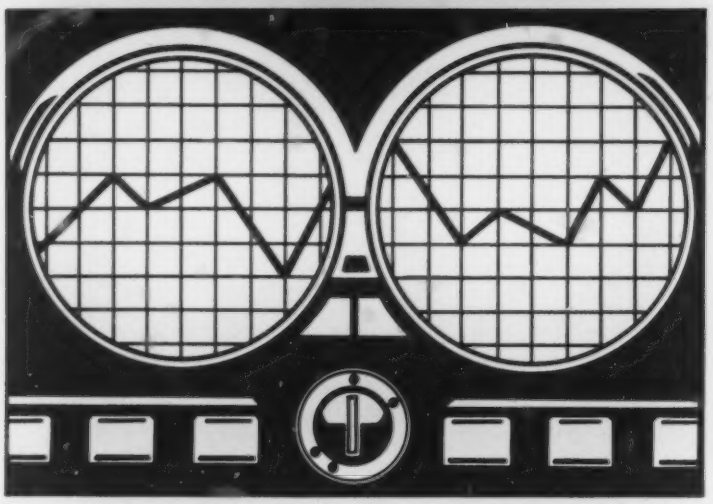


The Market Volume

U.S. MOTORCYCLE POPULATION BY MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

In 1990 there were an estimated 7.30 million motorcycles, scooters and all-terrain vehicles (ATVs) in use in the United States, compared to an estimated 7.59 million in 1989.

Of the total population in 1990, 50.0% were *on-highway* motorcycles and scooters, 41.0% were *off-highway* motorcycles and ATVs, and 9.0% were *dual purpose* motorcycles. The portion of the market represented by these segments remained relatively constant in 1990 compared to 1989.

Of all motorcycles, scooters and ATVs in use, it is estimated that just over half (54%) have an engine displacement less than 350 cubic centimeters. Less than half (41%) of the estimated population were purchased new during the last five years.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE, ENGINE DISPLACEMENT, AND YEAR

	1990		1989 Revised	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type*				
On-Highway	3,650,000	50.0%	3,796,000	50.0%
Off-Highway	2,990,000	41.0%	3,099,000	40.9%
Dual Purpose	660,000	9.0%	690,000	9.1%
	7,300,000	100.0%	7,585,000	100.0%
Engine Displacement				
Under 125 cc	1,301,500	17.8%	1,400,400	18.5%
125-349 cc	2,615,800	35.8%	2,702,000	35.6%
350-449 cc	478,900	6.6%	500,900	6.6%
450-749 cc	1,425,600	19.5%	1,470,900	19.4%
Over 749 cc	1,478,200	20.3%	1,510,800	19.9%
	7,300,000	100.0%	7,585,000	100.0%
Year Sold New				
1990	448,000	6.1%	—	—
1989	471,200	6.5%	491,300	6.5%
1988	605,900	8.3%	643,200	8.5%
1987	727,100	10.0%	814,700	10.7%
1986	731,200	10.0%	790,600	10.4%
1985	728,900	10.0%	847,200	11.2%
1984	643,000	8.8%	753,400	9.9%
1983	445,000	6.1%	557,600	7.3%
1982	295,000	4.0%	346,000	4.6%
1981	275,100	3.8%	332,100	4.4%
1980	228,100	3.1%	263,000	3.5%
1979	170,500	2.3%	201,400	2.6%
Prior to 1979	1,531,000	21.0%	1,544,500	20.4%
	7,300,000	100.0%	7,585,000	100.0%

NOTE: The 1990 estimates are comparable only to the 1985, 1984 revised, 1980, and 1979 revised estimates.

*** Model Type Definition:**

On-Highway: Motorcycles certified by the manufacturer as being in compliance with the Federal Motor Vehicle Safety Standards (FMVSS), and designed for use on public roads. *Includes scooters (450,000 in 1990 and 466,000 in 1989). Excludes mopeds and nopeds* (limited speed motor-driven cycles under 50 cc, without fully operative pedals).

Off-Highway: Motorcycles and all-terrain vehicles (ATVs) not certified by the manufacturer to be in compliance with FMVSS. *Includes three and four-wheeled ATVs (2,240,000 in 1990 and 2,309,000 in 1989).*

Dual Purpose: Motorcycles certified by the manufacturer as being in compliance with FMVSS, and designed with the capability for use on public roads, as well as off-highway recreational use.

Source: 1989 and 1990 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

U.S. MOTORCYCLE POPULATION, MODEL TYPE BY ENGINE DISPLACEMENT

On-highway motorcycles tend to have relatively large engines. In 1990, almost three-fourths (74%) of the on-highway motorcycles in use had an engine displacement over 449 cc's.

The off-highway segment, including competition motorcycles and all-terrain vehicles (ATVs), is dominated by relatively small engines. In 1990 nearly all (89%) of the off-highway motorcycles and ATVs in use had an engine displacement less than 350 cc's.

Dual purpose motorcycles also tend to have relatively small engines. About three-fourths (74%) of the dual purpose motorcycles in use in 1990 had an engine displacement less than 350 cc's.

ESTIMATED U.S. MOTORCYCLE POPULATION MODEL TYPE BY ENGINE DISPLACEMENT

	1990		1989 Revised	
	Number of Motorcycles	% of Total	Number of Motorcycles	% of Total
Model Type				
On-Highway	3,650,000	100.0%	3,796,000	100.0%
Under 125 cc	430,700	11.8%	444,100	11.7%
125-349 cc	328,500	9.0%	345,400	9.1%
350-449 cc	197,100	5.4%	231,600	6.1%
450-749 cc	1,215,500	33.3%	1,264,100	33.3%
Over 749 cc	1,478,200	40.5%	1,510,800	39.8%
Off-Highway	2,990,000	100.0%	3,099,000	100.0%
Under 125 cc	684,700	22.9%	750,000	24.2%
125-349 cc	1,982,400	66.3%	2,026,700	65.4%
350-449 cc	236,200	7.9%	229,300	7.4%
450-749 cc	86,700	2.9%	93,000	3.0%
Over 749 cc	0	0.0%	0	0.0%
Dual Purpose	660,000	100.0%	690,000	100.0%
Under 125 cc	186,100	28.2%	206,300	29.9%
125-349 cc	304,900	46.2%	329,800	47.8%
350-449 cc	45,600	6.9%	40,000	5.8%
450-749 cc	123,400	18.7%	113,900	16.5%
Over 749 cc	0	0.0%	0	0.0%

NOTE: The 1990 estimates are comparable only to the 1985, 1984 revised, 1980, and 1979 revised estimates.

On-highway includes scooters (450,000 in 1990 and 466,000 in 1989). Excludes mopeds and nopeds.
Off-highway includes three and four-wheeled all-terrain vehicles (2,240,000 in 1990 and 2,309,000 in 1989).
See page 6 for model type definitions.

Source: 1990 and 1989 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.

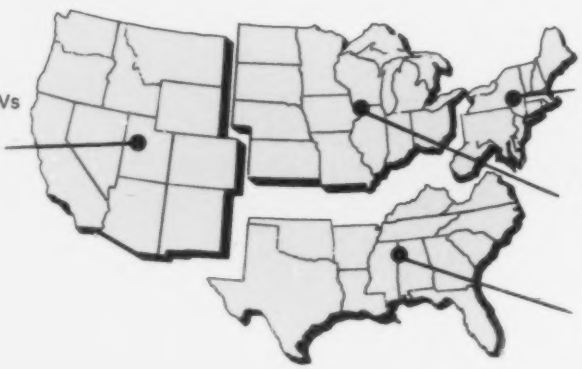
U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION AND STATE

On a regional basis the greatest number of motorcycles, scooters and ATVs in use in 1990 were in the South and the Midwest. Although the West ranked third in motorcycle, scooter and ATV population, California was, by far, the nation's leading state, where one in every eight (13%) of the nation's motorcycles, scooters and ATVs were owned.

In 1990 there were an estimated 3.0 motorcycles, scooters and ATVs owned by every 100 persons living in the United States. Regionally, penetration was highest in the West where 3.6 vehicles were owned for every 100 residents, and lowest in the East where 2.3 vehicles were owned for every 100 residents.

Nearly one third (33%) of the nation's motorcycle, scooter and ATV population was owned in the five leading states; California, Texas, New York, Florida, and Michigan.

1990 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY REGION



WEST
1,820,300 motorcycles, scooters & ATVs
3.6 vehicles per 100 persons
(Alaska and Hawaii included in West)

EAST
1,343,100 motorcycles, scooters & ATVs
2.3 vehicles per 100 persons

MIDWEST
1,880,400 motorcycles, scooters & ATVs
3.2 vehicles per 100 persons

SOUTH
2,256,200 motorcycles, scooters & ATVs
2.9 vehicles per 100 persons

1990 ESTIMATED U.S. MOTORCYCLE POPULATION AND PENETRATION BY STATE

State	Motorcycle Population	Motorcycle Population by Model Type			Motorcycle Penetration Per 100 Population
		On-Hwy.	Off-Hwy.	Dual Purpose	
Alabama	148,700	52,800	81,100	14,800	3.6
Alaska	38,800	6,300	28,900	3,600	6.9
Arizona	118,100	55,300	50,300	12,500	3.2
Arkansas	137,500	38,500	87,800	11,200	5.7
California	955,800	524,600	324,200	107,000	3.3
Colorado	108,000	53,000	39,100	15,900	3.2
Connecticut	81,700	52,400	23,900	5,400	2.5
Delaware	15,800	8,100	6,800	900	2.4
D.C.	1,600	1,600	0	0	0.3
Florida	314,600	179,800	102,300	32,500	2.5
Georgia	209,800	88,000	104,500	17,300	3.2
Hawaii	Not Available				
Idaho	62,300	15,800	32,000	14,500	6.2
Illinois	262,800	178,100	65,700	19,000	2.3
Indiana	191,500	115,800	65,200	10,500	3.5
Iowa	123,500	84,200	32,200	7,100	4.4
Kansas	70,900	40,600	23,400	6,900	2.9
Kentucky	95,100	35,100	53,100	6,900	2.5
Louisiana	131,000	42,900	80,300	7,800	2.9
Maine	57,000	28,800	24,000	4,200	4.7
Maryland	97,500	55,300	33,700	8,500	2.1
Mass.	127,300	80,800	39,700	6,800	2.2
Michigan	314,000	153,800	143,500	16,700	3.4
Minnesota	179,100	97,600	68,000	13,500	4.2
Mississippi	83,800	23,100	55,300	5,400	3.1
Missouri	142,400	55,700	77,700	9.000	2.8

State	Motorcycle Population	Motorcycle Population by Model Type			Motorcycle Penetration Per 100 Population
		On-Hwy.	Off-Hwy.	Dual Purpose	
Montana	42,700	11,100	23,100	8,500	5.3
Nebraska	54,500	23,300	26,300	4,900	3.4
Nevada	45,600	20,900	19,700	5,000	4.3
N.H.	61,700	36,300	21,800	3,600	5.5
New Jersey	143,900	80,900	52,100	10,900	1.8
New Mexico	51,500	23,200	20,000	8,300	3.2
New York	334,400	196,300	113,900	24,200	1.9
N.C.	177,600	71,500	93,200	12,900	2.7
N.D.	28,200	13,100	11,300	3,800	4.2
Ohio	295,500	170,300	110,200	15,000	2.7
Oklahoma	102,600	43,600	41,700	17,300	3.1
Oregon	119,100	46,500	58,700	13,900	4.3
Penn.	298,300	138,100	136,800	23,400	2.5
R.I.	23,800	17,800	4,700	1,300	2.4
S.C.	76,000	36,600	33,700	5,700	2.2
S.D.	30,400	14,800	12,100	3,500	4.3
Tennessee	169,100	58,800	94,700	15,600	3.4
Texas	460,100	245,400	171,300	43,400	2.6
Utah	87,600	25,400	45,300	16,900	5.0
Vermont	21,600	9,700	10,400	1,500	3.9
Virginia	150,300	75,300	59,600	15,400	2.5
Washington	166,200	80,700	64,000	21,500	3.6
W. Virginia	78,500	18,700	52,000	7,800	4.2
Wisconsin	187,600	116,600	57,400	13,600	3.9
Wyoming	24,600	7,100	13,300	4,200	4.9
U.S. Total	7,300,000	3,650,000	2,990,000	660,000	3.0

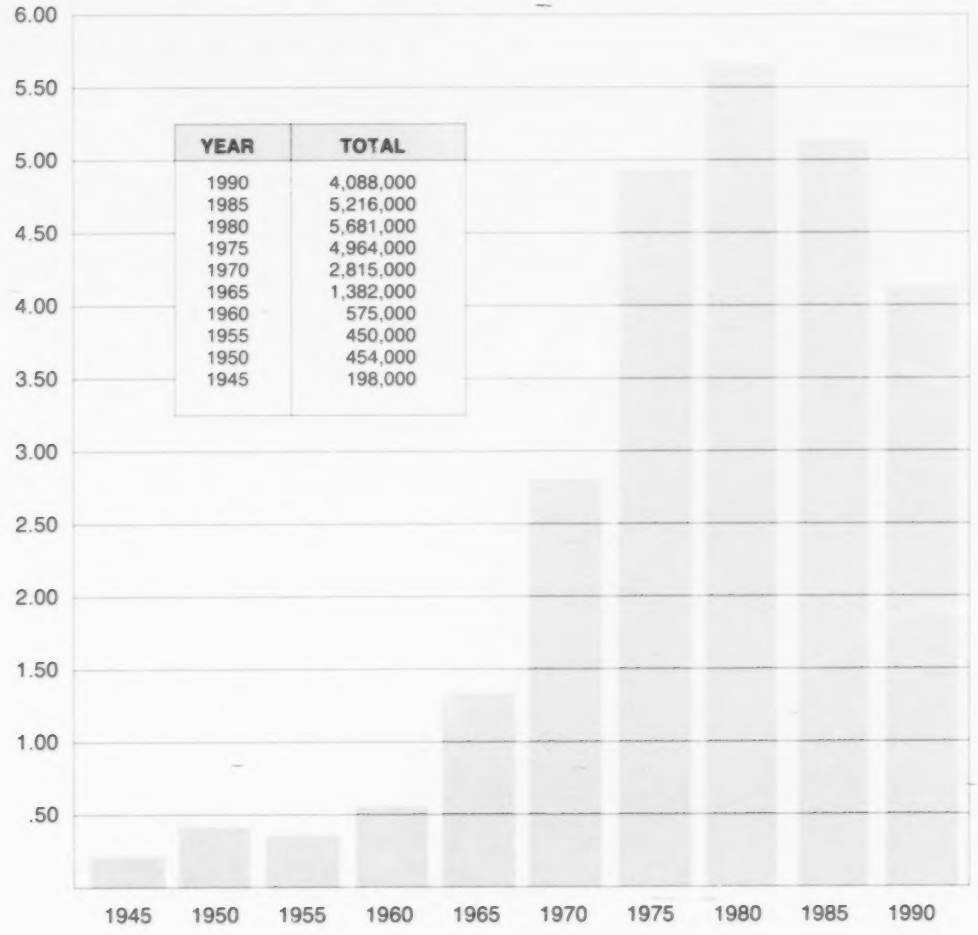
Note: Includes scooters and ATVs, and excludes mopeds and nopeds. See page 6 for model type definitions. The 1990 estimates are comparable only to the 1985, 1984 revised, 1980, and 1979 revised estimates.

Source: 1990 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Estimates of the Resident Population of States, July 1, 1989, U.S. Department of Commerce, Bureau of the Census.

TOTAL MOTORCYCLE REGISTRATIONS BY YEAR

Of the 7.3 million motorcycles, scooters and ATVs in use in the United States, an estimated 4.1 million, or 56%, were registered for use on public roads in 1990. In order to be registered for use on public roads, motorcycles must be in compliance with the Federal Motor Vehicle Safety Standards and the state motorcycle equipment requirements. The equipment requirements for street registered motorcycles are summarized on page 39. Some states include the titling of off-highway motorcycles and ATVs in their motorcycle registration totals.

U.S. TOTAL MOTORCYCLE REGISTRATIONS, 1945-1990



YEAR	TOTAL
1990	4,088,000
1985	5,216,000
1980	5,681,000
1975	4,964,000
1970	2,815,000
1965	1,382,000
1960	575,000
1955	450,000
1950	454,000
1945	198,000

Source: U.S. Department of Transportation, Federal Highway Administration for 1945-1975 motorcycle registrations. Motorcycle Safety Foundation, Irvine, California for 1980 and subsequent year motorcycle registrations.

TOTAL MOTORCYCLE REGISTRATIONS BY STATE

In 1990 motorcycle registrations accounted for 2.1% of all motor vehicles registered for use on public roads in the United States.

Regionally, the greatest portion of the nation's motorcycle registrations (31%) occurred in the Midwest. The West (29%) was second in motorcycle registrations, followed by the South (22%). The East (18%) reported the smallest portion of U.S. motorcycle registrations.

The five leading states, California, Ohio, Illinois, Florida and New York, accounted for over one third of the 4.1 million motorcycles registered in 1990.

U.S. TOTAL MOTORCYCLE REGISTRATIONS BY STATE, 1981-1990

State	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Alabama	75,220	70,960	71,333	71,502	66,176	62,562	56,752	52,715	46,460	42,939
Alaska	8,888	10,897*	15,087	15,094	14,432	14,103	13,273	12,461	11,801	11,542
Arizona	86,216	84,776	76,716	84,093*	78,430	78,233	76,741	76,091	73,576	78,876
Arkansas	30,388	25,938	23,768	28,119	28,844	28,844	20,048	16,586	15,122	14,537
California	731,310	645,000	695,813	695,251	702,782	699,239	647,488	664,819	643,137	640,745
Colorado	121,510*	119,079	120,000*	120,000*	110,562	107,660	107,000*	115,629	112,244	108,375
Connecticut	80,470	79,932	80,317	79,854	61,242	60,964	63,613	59,331	55,914	46,258
Delaware	8,348	8,216	8,538	8,573*	8,360	8,124	7,455	7,768	7,774	6,949
Dist. of Col.	5,768	5,896	5,514*	5,599*	3,385	2,758	2,478	1,911	2,800*	2,500*
Florida	225,441	221,571	224,965	221,339	239,840	216,025*	234,498	203,913*	195,293	195,607
Georgia	112,517	110,795*	110,795*	114,234	89,556	84,543	79,887	75,341	70,271	68,764
Hawaii	10,700	11,317	8,563	10,199	10,607	11,055	12,065	11,544	12,159	12,720
Idaho	55,975	53,302	52,124	50,595	47,854	47,019	41,712	38,282	36,108	33,602
Illinois	305,727	285,188	295,655	309,807*	241,105	250,829	242,000*	243,789	224,062	205,449
Indiana	172,574	160,071	138,916	135,729	133,232	135,729	104,578	99,745	96,729	96,298
Iowa	233,172	234,985	238,687	183,687	188,277	172,444	163,521	145,967	139,038	133,313
Kansas	140,677	106,566	83,587	83,744	78,739	73,890	69,532	64,724	61,419	61,000*
Kentucky	65,000	60,958	58,357	50,355	38,799	38,497	35,435	32,054	31,165	31,595
Louisiana	75,000*	109,312	92,740	104,000	113,667	89,700	93,352	68,080	71,017	71,750
Maine	39,857	38,872	38,872	40,361	37,950	37,246	37,676	35,876	35,166	33,932
Maryland	80,289	78,829	74,406	71,761	70,500	74,891	58,188	51,358	51,613	54,722
Massachusetts	100,369	108,410*	93,405	103,000	94,999	85,000	66,366	59,000*	58,984	71,624
Michigan	243,858	230,794	219,929	200,609	203,226	185,993	161,626	150,000*	142,061	134,319
Minnesota	166,151	159,345	155,502	153,851	151,449	141,261	134,590	128,956	123,308	120,081
Mississippi	29,273	29,068	28,198	26,116	25,653*	28,198	18,551	18,411	18,022	12,014
Missouri	142,488	117,787	109,154	111,106	98,766	78,533	98,766*	81,123	79,984	85,582
Montana	35,470	45,702	32,761*	37,371*	35,119*	27,493	25,503	24,294	24,000*	21,094
Nebraska	50,371	47,887	47,172	46,532	42,548	33,077	31,770	29,088	23,560	22,375
Nevada	21,008	21,940	26,062	20,780	20,013	18,899	21,248	17,649	17,886	18,445
New Hampshire	43,462	49,196*	49,756*	35,543	36,421	36,007	29,463	30,410	32,741	35,802
New Jersey	106,753*	114,112*	115,964*	115,303	95,500	116,602*	77,073	77,734	76,401	78,915
New Mexico	52,810	58,587	58,217	56,148	52,236	42,152	40,127	35,421	38,528	34,166
New York	160,619	157,792	163,740	174,911	216,688	214,893	207,524	201,265	192,738	187,695
North Carolina	110,156*	110,000	69,616	67,615	67,632	64,129	64,129	59,991	55,844	56,799
North Dakota	31,115	31,312	32,134	31,480	30,596	28,118	32,152	23,978	21,674	20,113
Ohio	185,678*	277,143	290,799	280,297	277,487	304,128	258,243	243,885	244,003	216,133
Oklahoma	129,704	137,369*	127,800	105,963	104,457	68,093	67,802	64,056	60,863	61,500*
Oregon	92,316	90,261	89,956	78,166	89,886	87,105	83,281	71,538	69,928	66,280
Pennsylvania	190,480*	227,752	208,925	207,170	201,069	190,345	183,130	174,790	167,201	163,508
Rhode Island	23,789*	22,895	27,853	27,907	27,454	27,155	29,354	32,626	30,000*	25,945
South Carolina	42,257	35,028	36,130	37,119	37,119	36,074	34,220*	33,426	30,050	29,715
South Dakota	38,265	38,418	39,255	38,956	37,905	36,036	33,800	31,421	29,942	23,719
Tennessee	83,179	83,269	79,821	100,879	85,985*	114,071*	82,728	114,071*	80,591	80,299
Texas	300,330	312,924*	334,681	306,578	277,551	248,715	225,997	206,497	187,687	170,642
Utah	66,653*	66,934*	64,758	67,603*	71,923*	53,000	45,435	28,900	27,063	26,057
Vermont	29,449*	21,812	21,347	25,724*	23,415	23,048	21,854	17,438	16,365	15,199
Virginia	87,951	80,515	79,039	81,825	83,920	79,037	72,183	66,327	64,000*	59,440
Washington	139,931	131,667	127,950	136,679*	125,224	122,751	124,215	112,228	108,082	103,301
West Virginia	37,680	37,680	31,789	33,432	32,270	31,992	27,067	26,511	24,505	21,404
Wisconsin	190,961	188,863	185,685	190,612	188,331	186,020	167,792	167,055	161,306	160,642
Wyoming	20,763*	21,937	22,401	22,282	16,760	21,500	21,428	20,050	18,800	14,016
TOTAL	5,618,336	5,578,859	5,484,552	5,405,453	5,215,941	5,023,780	4,654,709	4,426,123	4,218,985	4,088,297

Note: See footnote on page 38 for types of vehicles included in 1990 state total motorcycle registrations. *Estimated

Source: Motorcycle Safety Foundation, Irvine, California.

ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

In 1990 the motorcycle industry generated an estimated $6.97 billion in consumer sales and services and state taxes and licensing, of which $1.84 billion, or 26.4%, is attributed to retail sales of new motorcycles, scooters, and ATVs.

In addition to this $6.97 billion generated by the retail marketplace, major contributions to the economic value of the industry in personnel salaries, product advertising, corporate and personal income taxes, etc., are made by the manufacturers and distributors of new motorcycles, scooters and ATVs, parts and accessories, and the trades allied to the industry.

1990 ESTIMATED ANNUAL ECONOMIC VALUE OF THE MOTORCYCLE RETAIL MARKETPLACE BY STATE

State	1990 Estimated Annual* Economic Value of the Retail Marketplace	1990 Estimated Retail Sales of New Motorcycles		State	1990 Estimated Annual* Economic Value of the Retail Marketplace	1990 Estimated Retail Sales of New Motorcycles	
	$000's	Units	$000's		$000's	Units	$000's
Alabama	$ 102,510	8,690	$ 26,650	Montana	$ 51,530	3,050	$ 10,820
Alaska	61,250	3,220	12,860	Nebraska	55,770	2,910	11,710
Arizona	120,350	8,670	35,260	Nevada	66,770	4,190	14,020
Arkansas	117,200	8,990	30,470	New Hampshire	72,630	2,940	15,250
California	927,290	66,140	276,330	New Jersey	144,820	9,010	41,270
Colorado	110,280	7,360	32,310	New Mexico	50,150	2,630	10,530
Connecticut	97,110	4,100	20,390	New York	303,700	18,440	81,690
Delaware	30,740	1,470	5,500	North Carolina	191,760	13,270	51,580
Dist. of Col.	0	0	0	North Dakota	30,680	1,370	5,490
Florida	336,300	24,010	90,460	Ohio	285,880	17,730	76,900
Georgia	125,780	10,450	36,850	Oklahoma	92,390	5,190	19,400
Hawaii	Not Avail.	Not Avail.	Not Avail.	Oregon	111,400	7,680	28,960
Idaho	70,010	4,680	14,700	Pennsylvania	305,590	19,820	82,200
Illinois	287,600	19,580	77,360	Rhode Island	29,510	790	5,280
Indiana	137,350	11,090	40,240	South Carolina	93,340	5,710	19,600
Iowa	91,160	6,160	23,700	South Dakota	43,920	1,850	7,860
Kansas	64,870	3,320	13,620	Tennessee	132,840	11,000	38,920
Kentucky	90,470	7,520	23,520	Texas	358,030	23,060	93,800
Louisiana	107,510	7,820	27,950	Utah	70,630	4,090	14,830
Maine	57,870	2,840	12,150	Vermont	19,400	660	3,470
Maryland	106,740	6,890	27,750	Virginia	114,000	8,300	33,400
Massachusetts	117,700	5,900	30,600	Washington	145,330	11,550	42,580
Michigan	267,530	19,010	71,960	West Virginia	81,090	5,970	21,080
Minnesota	263,400	16,360	70,850	Wisconsin	189,900	11,930	51,080
Mississippi	88,390	5,510	18,560	Wyoming	32,520	1,430	5,820
Missouri	117,010	7,650	30,420	U.S. Total	$6,970,000	462,000	$1,838,000

Note: The 1990 figures above are not comparable to prior year estimates due to retail sales and population revisions. See page 12 for updated retail sales estimates for prior years.

New motorcycle retail sales include all-terrain vehicles, scooters, and nopeds (limited speed motor-driven cycles under 50 cc which are not generally defined by state as mopeds). Excludes mopeds. New motorcycle retail sales dollars based on the manufacturers "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

*The 1990 estimated annual economic value of the retail marketplace includes retail sales of motorcycles, scooters, and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees. Revenues from industry publications, corporate income taxes, personal income tax from non-dealer salaries, motorcycle and aftermarket manufacturer and distributor personnel salaries and advertising, and special events attendance are not included.

Source: "1990 Estimated Retail Sales of New Motorcycles" for each state was derived by the Motorcycle Industry Council from the MIC Manufacturers Shipment Reporting System, adjusted for retail sales. "1990 Estimated Annual Economic Value of the Motorcycle Retail Marketplace" was derived by the Motorcycle Industry Council from the percent of the annual industry economic value represented by the estimated retail sales dollars for new motorcycles in a sample of states.

NEW MOTORCYCLE RETAIL SALES BY MODEL TYPE

In 1990, estimated retail sales of new motorcycles, scooters, and ATVs were 462,000 units, valued at 1.8 billion dollars.

Off-highway motorcycles and ATVs totalled an estimated 229,000 units, or about one half (50%) of the new retail sales units in 1990. An estimated 145,000 of these off-highway retail sales units were ATVs. Off-highway retail sales accounted for 0.7 billion dollars, or 38% of the total retail sales dollars.

New retail unit sales of on-highway motorcycles and scooters were 214,000 in 1990, or 46% of the total retail sales. On-highway retail sales accounted for 1.1 billion dollars, over half (59%) of the retail dollars in 1990. Dual purpose motorcycles represented 19,000 new unit sales and 52 million retail dollars in 1990.

ESTIMATED NEW RETAIL SALES BY MODEL TYPE, 1970-1990

Year	Total		On-Highway		Off-Highway		Dual Purpose	
	Units	Retail $	Units	Retail $	Units	Retail $	Units	Retail $
	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)	(000's)	(000,000's)
1970	1,010	$ N/A	333	$ N/A	199	$ N/A	478	$ N/A
1971	1,240	N/A	472	N/A	226	N/A	542	N/A
1972	1,360	1,027	564	591	233	101	563	335
1973	1,520	1,250	655	719	292	161	573	370
1974	1,200	1,285	489	739	244	171	467	375
1975	940	1,209	451	819	247	188	242	202
1976	1,050	1,298	491	853	260	200	299	245
1977	1,080	1,487	568	1,015	283	287	229	185
1978	975	1,432	482	1,005	326	276	167	151
1979	1,085	1,752	606	1,277	332	321	147	154
1980	1,070	1,971	654	1,526	313	330	103	115
1981	1,065	2,160	614	1,621	370	446	81	93
1982	990	1,991	520	1,389	415	528	55	74
1983	1,185	2,353	550	1,468	580	811	55	74
1984	1,305	2,838	550	1,691	700	1,061	55	86
1985	1,260	2,787	520	1,508	695	1,207	45	72
1986	1,075	2,575	440	1,322	605	1,200	30	53
1987	970	2,553	438	1,348	505	1,152	27	53
1988	710	2,292	310	1,248	375	988	25	56
1989	515	1,886	227	1,028	270	814	18	44
1990	462	1,838	214	1,090	229	696	19	52

Note: See page 6 for model type definitions.

On-Highway includes scooters and nopeds, and excludes mopeds. Estimated 1982-1990 scooter retail sales units and dollars are as follows:

1982 — 15,000 units, $ 17,100,000
1983 — 25,000 units, $ 19,700,000
1984 — 65,000 units, $ 55,325,000
1985 — 115,000 units, $ 89,100,000
1986 — 135,000 units, $141,300,000
1987 — 153,000 units, $129,681,000
1988 — 90,000 units, $ 94,923,000
1989 — 55,000 units, $ 68,640,000
1990 — 51,000 units, $ 66,759,000

Estimates prior to 1982 are not available.

Off-Highway includes three and four-wheeled ATVs and competition motorcycles. 1982-1990 estimated ATV retail unit and dollar sales are as follows:

1982 — 250,000 units, $321,000,000
1983 — 425,000 units, $599,675,000
1984 — 550,000 units, $848,650,000
1985 — 550,000 units, $989,450,000
1986 — 480,000 units, $990,240,000
1987 — 405,000 units, $959,445,000
1988 — 260,000 units, $796,630,000
1989 — 200,000 units, $639,000,000
1990 — 145,000 units, $489,000,000

Estimates prior to 1982 are not available.

Retail $ — The estimated retail dollar volume is based on the manufacturer's "suggested retail price" per model as published in the MIC Manufacturers Shipment Reporting System.

Source: Units — MIC estimate derived from motorcycle import, production, wholesale, inventory, and registration statistics.
Retail Dollars — Based on the manufacturer's "suggested retail price" as published in the MIC Manufacturers Shipment Reporting System.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY

In 1990, an estimated 140,000 motorcycles and ATVs were manufactured in the U.S. 1990 motorcycle and scooter imports totalled 169,000 units, and ATV imports totalled an estimated 100,000 units. Wholesale sales of new motorcycles, scooters, and ATVs to dealers in 1990 were an estimated 392,000 units, valued at 1.2 billion dollars. New registrations of on-highway motorcycles, scooters, and some off-highway motorcycles and ATVs equalled 269,000 in 1990.

U.S. production, imports, wholesale sales, and new registrations are summarized below from 1970 to 1990, and in greater detail on the following pages.

U.S. PRODUCTION, IMPORT, WHOLESALE, AND NEW REGISTRATION SUMMARY, 1970-1990

Year	Estimated U.S. Production	U.S. Motorcycle Imports		Estimated U.S. ATV Imports	Estimated Wholesale Sales		New Registrations
	Units	Units	Dollars	Units	Units	Dollars	Units
	(000's)	(000's)	(000,000's)	(000's)	(000's)	(000,000's)	(000's)
1970	35	1,091	$ 308	N/A	1,040	$ 467	N/A
1971	25	1,539	495	N/A	1,340	670	928
1972	35	1,690	697	N/A	1,400	801	1,006
1973	45	1,206	570	N/A	1,580	980	1,190
1974	40	1,543	911	N/A	1,200	977	1,024
1975	40	948	711	N/A	910	900	747
1976	80	659	466	N/A	1,050	1,006	783
1977	110	860	588	N/A	1,100	1,140	849
1978	80	935	797	N/A	1,000	1,160	797
1979	120	987	870	N/A	1,090	1,405	886
1980	130	1,120	1,142	N/A	1,190	1,750	876
1981	125	1,057	1,314	N/A	1,155	1,890	828
1982	100	917	1,110	N/A	1,025	1,609	726
1983	100	540	697	N/A	1,260	2,015	811
1984	155	441	523	635	1,400	2,354	772
1985	130	733	783	683	1,290	2,281	722
1986	105	550	763	498	990	1,915	631
1987	125	318	463	320	865	1,850	550
1988	110	287	512	210	590	1,568	410
1989	120	253	542	121	424	1,209	294
1990	140	169	361	100	392	1,233	269

Note: Production — Includes motorcycles, scooters, and three and four-wheeled ATVs if manufactured in the U.S.

Motorcycle Imports — Includes motorcycles, scooters, and nopeds; ATVs and mopeds not included. Dollar value equals dutiable value for 1970-1979 and C.I.F. value for 1980 and subsequent years.

ATV Imports — Includes three and four-wheeled ATVs. ATVs manufactured in the U.S. not included.

Wholesale Sales — Includes motorcycles, scooters, nopeds, and three and four-wheeled ATVs. The wholesale dollar volume is based on the lowest price at which the vehicle is sold to dealers f.o.b. point of U.S. manufacture or point of entry. This wholesale price does not consider dealer discounts, special promotional allowances, rebates, or other incentives.

New Registrations — Includes first-time registrations of motorcycles, scooters, nopeds, and some off-highway motorcycles and ATVs for the three most current model years. Oklahoma registrations first became available in 1987. Incomplete Ohio registrations estimated for 1974. 1978 and subsequent years include California off-highway registrations. New York registrations not available from October 1983-December 1984. 1990 California totals were derived from sales records, rather than registrations.

Source: Production — MIC estimate derived from R.L. Polk & Co. new motorcycle registrations and information offered by the U.S. distributors.
Imports — U.S. Dept. of Commerce and U.S. Motorcycle Imports and U.S. Moped, Motor Scooters, 3 & 4 Wheeler Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.
Wholesale Sales — MIC Manufacturers Shipment Reporting System for major distributors and MIC estimate for other brands.
New Registrations — New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

U.S. MOTORCYCLE IMPORTS BY YEAR, COUNTRY, AND ENGINE DISPLACEMENT

In 1990, 169,000 motorcycles and scooters with a dutiable value of $361 million were imported into the United States. Of these units imported, 90.9% were from Japan, 3.8% from European countries, and 5.3% from other countries. In addition to these motorcycles and scooters, 12,950 mopeds or motorized bicycles were imported in 1990, primarily from European countries. All-terrain vehicles are not included.

The imports with relatively small engines, less than 191 cc displacement, represented 39% of the total units imported, but only 19% of the total dutiable dollar value. Imports with relatively large engines, over 490 cc displacement, represented 36% of the units imported and 57% of the total dutiable dollar volume in 1990.

U.S. MOTORCYCLE IMPORTS BY COUNTRY, 1984-1990

	1984	1985	1986	1987	1988	1989	1990
Japan							
Units	417,824	710,959	535,028	305,827	274,604	231,942	153,389
$ Value	$ 482,238,238	$ 737,814,137	$ 724,051,178	$ 424,612,449	$ 468,969,686	$ 504,101,573	$ 322,920,097
European Countries							
Units	17,397*	21,178*	13,748*	11,077*	12,021*	5,901*	6,365*
$ Value	$ 38,296,805	$ 42,816,389	$ 38,261,208	$ 37,865,258	$ 42,437,399	$ 22,002,791	$ 28,389,442
All Others							
Units	6,199*	1,201*	893*	970*	282*	14,819*	8,997*
$ Value	$ 2,851,599	$ 2,455,798	$ 451,164	$ 681,460	$ 377,788	$ 16,022,667	$ 10,058,151
Total							
Units	441,420*	733,338*	549,669*	317,874*	286,907*	252,662*	168,751*
$ Value	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873	$ 542,127,031	$ 361,367,690

SCOOTERS INCLUDED; ATVs EXCLUDED. Dollar Value = C.I.F. Value.

U.S. MOTORCYCLE IMPORTS BY ENGINE DISPLACEMENT, 1984-1990

	1984	1985	1986	1987	1988	1989	1990
Under 191 cc							
Units	191,856*	355,670*	241,250*	156,485*	133,828*	90,156*	65,151*
$ Value	$ 97,761,171	$ 176,053,176	$ 152,153,709	$ 109,835,387	$ 107,923,087	$ 90,213,779	$ 68,812,771
191-490 cc							
Units	67,792	164,493	148,941	68,530	64,511	62,422	42,279
$ Value	$ 78,049,993	$ 183,019,603	$ 218,738,761	$ 105,170,653	$ 130,736,424	$ 131,691,173	$86,417,256
491-790 cc							
Units	141,716	177,605	129,932	70,841	67,101	65,902	45,074
$ Value	$ 256,491,632	$ 329,283,894	$ 291,693,936	$ 171,185,050	$ 189,330,629	$ 183,957,001	$ 135,723,313
Over 790 cc							
Units	34,828	31,274	28,702	20,694	18,394	31,329	15,749
$ Value	$ 88,441,983	$ 91,724,205	$ 99,838,528	$ 75,631,655	$ 82,913,454	$ 134,978,446	$ 70,256,399
Unspecified							
Units	5,228	4,296	844	1,324	3,073	2,853	498
$ Value	$ 2,641,863	$ 3,005,446	$ 338,616	$ 1,336,422	$ 881,279	$ 1,286,632	$ 157,951
Total							
Units	441,420*	733,338*	549,669*	317,874*	286,907*	252,662*	168,751*
$ Value	$ 523,386,642	$ 783,086,324	$ 762,763,550	$ 463,159,167	$ 511,784,873	$ 542,127,031	$ 361,367,690

SCOOTERS INCLUDED; ATVs EXCLUDED

Dollar Value = C.I.F. Value.

*Excludes estimated imports of mopeds (motorized bicycles) as follows:

1984- 32,889 units, $ 8,900,146
1985- 30,174 units, $ 8,981,153
1986- 22,557 units, $ 6,984,588
1987- 23,683 units, $ 7,258,696
1988- 9,628 units, $ 3,358,684
1989- 11,587 units, $ 3,921,878
1990- 12,950 units, $ 5,466,226

Source: U.S. Dept. of Commerce, Domestic and International Business Administration.
U.S. Motorcycle Imports, Werner C. Single, Foreign Trade Services, W. New York, New Jersey.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS

In 1990 estimated wholesale sales of new motorcycles and all-terrain vehicles (ATVs) to dealers by the five leading brands (Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha) in the United States were 369,967 units, valued at a wholesale dollar volume of $1.18 billion and an estimated retail dollar volume of $1.45 billion.

Of the total units wholesaled in 1990, 37.3% were on-highway motorcycles, 57.3% were off-highway motorcycles and ATVs, and the remaining 5.4% were dual purpose motorcycles. Almost three fourths (73.1%) of the new motorcycles and ATVs shipped to dealers in 1990 had four-cycle engines, and over one half (61%) had an engine displacement less than 350 cubic centimeters. The five leading states in wholesale unit sales (California, Texas, Florida, Pennsylvania, and Michigan) accounted for one third (33%) of the total U.S. wholesale sales in 1990.

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS, 1986-1990

			Units										
				Model Type			Engine Type		Displacement Size (cc)				
	Wholesale $ Volume	Est. Retail $ Volume	Total Units	On-Highway	Off-Highway	Dual Purpose	Two-Stroke	Four-Stroke	Under 125 cc	125-349 cc	350-449 cc	450-749 cc	750 cc & Up
	($000's)	($000's)											
1986 (% of Total Units)	$1,790,247	$2,206,015	853,426 (100.0%)	273,148 (32.0%)	555,419 (65.1%)	24,859 (2.9%)	142,586 (16.7%)	710,840 (83.3%)	136,176 (15.9%)	383,572 (44.9%)	77,269 (9.1%)	153,533 (18.0%)	102,876 (12.1%)
1987 (% of Total Units)	$1,728,223	$2,125,598	728,042 (100.0%)	237,200 (32.6%)	465,051 (63.9%)	25,791 (3.5%)	141,577 (19.4%)	586,465 (80.6%)	116,774 (16.0%)	332,303 (45.7%)	60,094 (8.3%)	117,409 (16.1%)	101,462 (13.9%)
1988 (% of Total Units)	$1,445,607	$1,769,990	483,005 (100.0%)	198,342 (41.1%)	257,658 (53.3%)	27,005 (5.6%)	104,825 (21.7%)	378,180 (78.3%)	69,240 (14.3%)	194,218 (40.2%)	38,265 (7.9%)	78,609 (16.3%)	102,673 (21.3%)
1989 (% of Total Units)	$1,168,059	$1,434,965	405,679 (100.0%)	179,743 (44.3%)	208,333 (51.4%)	17,603 (4.3%)	115,737 (28.5%)	289,942 (71.5%)	82,934 (20.4%)	107,340 (42.0%)	28,380 (7.0%)	54,289 (13.4%)	69,736 (17.2%)
1990 (% of Total Units)	$1,180,242	$1,448,056	369,967 (100.0%)	138,010 (37.3%)	211,941 (57.3%)	20,016 (5.4%)	99,382 (26.9%)	270,585 (73.1%)	64,075 (17.3%)	160,960 (43.5%)	29,038 (7.8%)	46,855 (12.7%)	69,039 18.7%)

NEW MOTORCYCLE WHOLESALE SALES BY MAJOR BRANDS IN TEN LEADING STATES, 1986-90

State	1990 Rank	1990 Units	1989 Rank	1989 Units	1988 Rank	1988 Units	1987 Rank	1987 Units	1986 Rank	1986 Units
California	1	52,600	1	60,427	1	61,327	1	88,328	1	102,749
Texas	2	18,576	2	22,845	2	29,768	3	34,433	2	42,237
Florida	3	18,073	3	20,517	6	17,971	7	28,994	7	31,994
Pennsylvania	4	16,454	6	16,240	4	21,642	4	33,217	5	40,297
Michigan	5	14,655	5	17,504	5	20,733	2	36,733	3	41,944
New York	6	14,567	4	17,720	3	21,857	6	30,614	4	41,079
Ohio	7	14,154	8	13,590	7	17,666	5	31,165	6	40,184
Illinois	8	13,760	7	15,610	9	14,958	10	23,052	10	25,859
Minnesota	9	12,342	13	10,201	11	12,573	18	15,986	19	17,592
North Carolina	10	11,192	9	11,550	10	14,271	9	23,489	9	27,113

NOTE: Includes all-terrain vehicles and nopeds (limited speed, motor-driven cycles under 50 cc's without fully operative pedals). **Scooter shipments included for 1989 and 1990. Excludes mopeds.** See page 6 for model type definitions.

Source: Manufacturers Shipment Reporting System, Annual Statistical Report, Motorcycle Industry Council, Inc., Irvine, California. Includes wholesale shipments to dealers by Harley-Davidson, Honda, Kawasaki, Suzuki and Yamaha.

NEW MOTORCYCLE REGISTRATIONS BY STATE

In 1990, first-time registrations of new motorcycles, scooters and ATVs for the three most current model years were 269,475, or 58%, of the estimated 462,000 retail sales. New registrations are usually issued only to street legal motorcycles. A number of states, however, issue registrations for titling purposes for off-highway motorcycles and ATVs. In 1990, new registrations of off-highway motorcycles and ATVs represented 33% of all new registrations.

Oklahoma new registrations first became available in 1987. California 1990 statistics are derived from sales records, rather than registrations.

NEW MOTORCYCLE REGISTRATIONS BY STATE, 1985-1990

	1985	1986	1987	1988	1989	1990
Total U.S.	721,975	630,739	550,494	409,734	293,726	269,475
State						
Alabama	21,907*	19,261*	19,489*	10,520*	5,454*	5,530*
Alaska	1,405*	1,168*	943*	1,053*	908*	874*
Arizona	10,862*	18,351*	12,413*	7,225*	5,515*	4,823*
Arkansas	8,304*	5,576*	4,695*	4,630*	3,886*	3,207*
California	151,432*	132,423*	111,008*	75,289*	57,055*	53,189
Colorado	6,234	5,258	4,819	3,822	3,135	3,127
Connecticut	6,136	6,183	6,064	4,472	3,309	2,970
Delaware	912	966	801	847	667	723
Dist. of Columbia	817	476	376	338	185	164
Florida	21,173	17,955	19,536	12,710	9,884	10,013
Georgia	30,480*	26,967*	15,755*	5,185	3,504	3,085
Hawaii	1,149	1,283	1,297	1,497	1,289	1,398
Idaho	3,164	2,012	1,740	1,213	1,089	2,087*
Illinois	35,617*	31,333*	31,010*	21,643*	14,754*	12,939
Indiana	11,052	9,000	8,443	6,335	4,502	4,247
Iowa	9,374	6,807	6,341	4,724	3,337	2,846
Kansas	6,582	5,227	4,342	2,810	2,334	1,990
Kentucky	4,901	4,674	3,898	2,839*	2,028*	1,982*
Louisiana	18,258*	14,731*	11,212*	8,242*	5,570*	5,563*
Maine	2,318	2,568	2,680	2,077	1,184	1,153
Maryland	9,622	8,203*	8,343*	6,882*	5,122*	5,253
Massachusetts	9,542	9,591	8,780	7,730	5,396	4,234
Michigan	17,037	24,685*	10,829	24,683*	18,193*	12,839*
Minnesota	8,657	6,449	7,443	5,974	4,068	3,877
Mississippi	10,872*	9,403*	8,107*	5,918*	4,346*	4,169*
Missouri	18,313*	14,311*	5,471	15,364*	7,454*	5,687*
Montana	1,622	1,193	1,013	902	896*	2,291*
Nebraska	3,403*	2,484*	2,024	1,073	638	559
Nevada	1,820	1,578	1,666	1,459	1,178	1,168
New Hampshire	3,607	3,709	3,961	3,590	2,392	1,951
New Jersey	9,662	8,895	7,789	6,396	5,473	5,697
New Mexico	8,145*	6,302*	4,676*	3,189*	2,569*	2,314*
New York	29,978	24,440	38,530*	21,169*	14,327*	12,931
North Carolina	8,495	7,660	6,993	5,125	4,155	4,104
North Dakota	2,165*	1,850*	1,452*	921*	767*	651*
Ohio	19,916	16,503	15,069	10,941	7,755	7,217
Oklahoma	N/A	N/A	3,576	2,606	2,103	2,227
Oregon	18,786*	16,460*	14,117*	8,771*	5,670*	5,334*
Pennsylvania	25,427*	19,669*	14,662	11,440	9,038	9,225
Rhode Island	2,638	2,246	2,237	1,520	1,062	819
South Carolina	7,907*	6,025*	6,005*	5,204*	3,879*	3,930*
South Dakota	2,814*	2,274*	1,836*	1,485*	1,140*	1,187*
Tennessee	14,098*	11,749*	12,296*	10,935*	7,116*	6,161*
Texas	53,567	47,537*	37,264*	28,242*	19,847*	15,905*
Utah	18,009*	10,742*	8,033*	4,569*	3,567*	3,053*
Vermont	2,764*	1,850*	2,136*	1,282*	1,322*	925*
Virginia	10,452	9,025	7,692	5,742	4,108	3,977
Washington	25,029*	21,452*	19,975*	13,004*	8,994*	8,918*
West Virginia	8,826*	7,655*	6,334*	5,765*	4,156*	3,780*
Wisconsin	14,569	12,905	13,796	9,258	6,535	6,467
Wyoming	2,156*	1,675*	1,527*	1,124*	871*	715*

* New registrations in these states include an unusually high percentage (20%-70%) of off-highway motorcycles and all-terrain vehicles.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L.Polk & Co.

NEW MOTORCYCLE REGISTRATIONS BY LEADING BRANDS

The nation's six major brands accounted for 99.3% of the new registrations in 1990. Honda, the leading brand during the past two decades, ranked first in 1990 with 27.4% of the registered market, followed by Yamaha with 23.2%, Harley-Davidson with 17.4%, and Kawasaki with 15.9%. Suzuki ranked fifth in 1990 with 14.3% of the new motorcycle registrations, and BMW ranked sixth with 1.1%. The market share for each of the remaining motorcycle brands distributed in the United States was reported to be less than 0.5% in 1990.

Although registrations are usually issued only to street legal motorcycles, some states issue registrations for off-highway motorcycles and ATVs for titling purposes.

NEW MOTORCYCLE REGISTRATIONS LEADING BRANDS BY MARKET SHARE, 1985-1990

Make	1990		1989		1988		1987		1986		1985	
	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share	Rank	Market Share
Honda	1	27.4%	1	28.9%	1	39.0%	1	50.8%	1	55.0%	1	58.5%
Yamaha	2	23.2%	2	25.7%	2	23.0%	2	19.8%	2	17.8%	2	15.7%
Harley-Davidson	3	17.4%	3	14.0%	5	9.4%	5	6.3%	5	5.0%	5	4.1%
Kawasaki	4	15.9%	3	15.7%	3	13.9%	4	10.2%	4	9.7%	3	10.4%
Suzuki	5	14.3%	4	14.2%	4	13.3%	3	11.6%	3	11.1%	4	10.0%
BMW	6	1.1%	6	0.9%	6	0.8%	6	0.7%	6	0.9%	6	0.8%

Note: The market share for other brands was less than 0.5%.

R.L. Polk new registrations include the three most current model years. Some off-highway motorcycle and all-terrain vehicle new registrations are included.

California 1990 statistics are derived from sales records, rather than registrations.

Oklahoma new registrations first became available in 1987.

Source: New Motorcycle Registrations, R.L. Polk & Co., Detroit, Michigan. Permission for further use must be obtained from R.L. Polk & Co.

MOTORCYCLE SCRAPPAGE AND OPERABILITY RATE

The number of motorcycles, scooters, and ATVs retired from use, or scrapped, in 1990 was an estimated 733 thousand or 9.7% of the 1989 population in use.

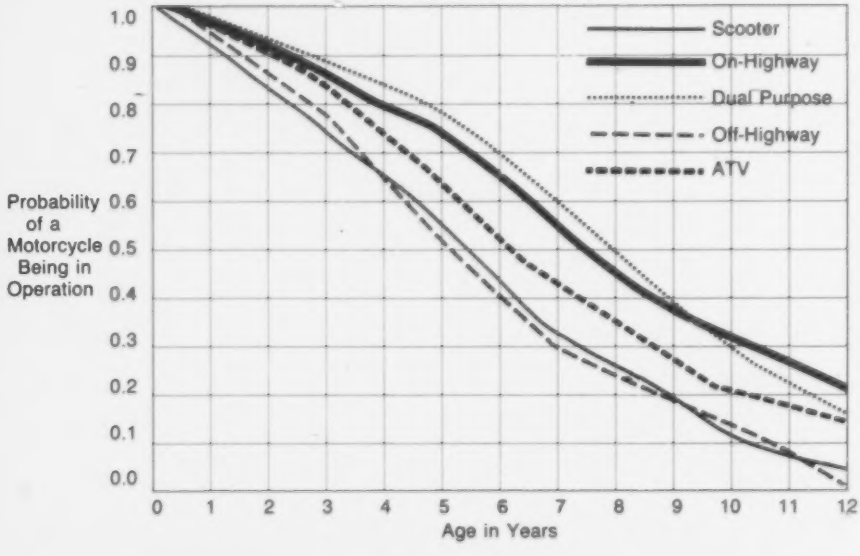
A key factor in determining average annual mileage is the motorcycle operability rate (the probability of a motorcycle being operable after a given number of years) because of the decrease in annual mileage as the vehicle ages. The operability rate for on-highway and dual purpose motorcycles tends to be higher than the rate for off-highway motorcycles.

MOTORCYCLES RETIRED FROM USE OR SCRAPPED IN 1990

Year Sold New	Est. Retail Sales (000's)	Operability Rate '89	Operability Rate '90	Estimated Population In Use (000's) '89	Estimated Population In Use (000's) '90	Estimated Number Retired From Use or Scrapped In 1990 (000's)	
1990	459		.976		448	—	
1989	507	.968	.929	491	471	20	
1988	700	.919	.866	643	606	37	
1987	960	.849	.757	815	727	88	
1986	1,057	.748	.692	791	731	60	
1985	1,230	.689	.593	847	729	118	
1984	1,275	.591	.504	753	643	110	
1983	1,095	.510	.406	558	445	113	
1982	900	.384	.328	346	295	51	
1981	1,001	.332	.275	332	275	57	
1980	985	.267	.231	263	228	35	
1979	1,007	.200	.170	201	171	30	
Before 1979				1,545	1,531	14	
				7,585	7,300	733	9.7% of 1989 — Population

Note: The operability rates shown above are composites of the operability rates by model type and will vary each year according to the motorcycle population by model type. Mopeds and nopeds are excluded from retail sales estimates. Includes ATVs and scooters.

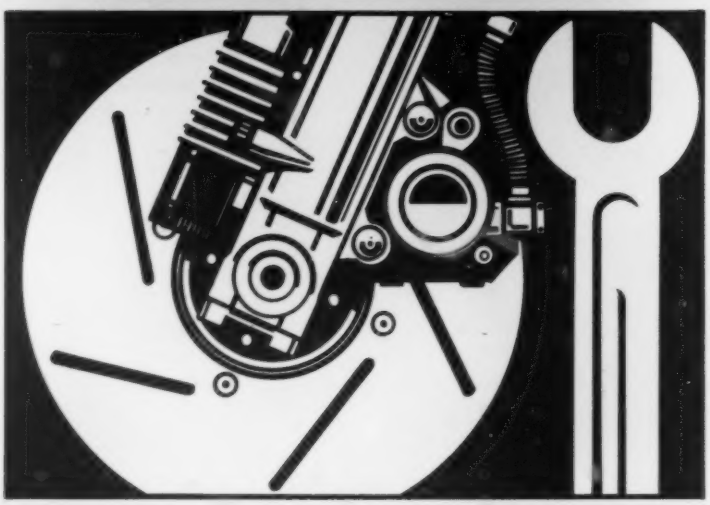
OPERABILITY RATE



OPERABILITY RATE

Age	Scooter	On-Hwy.	Dual Purpose	Off-Hwy.	ATV
0.5	.94	.98	.99	.98	.98
1.5	.88	.96	.95	.89	.93
2.5	.79	.89	.92	.82	.88
3.5	.71	.82	.86	.70	.74
4.5	.60	.77	.81	.59	.69
5.5	.50	.68	.74	.48	.57
6.5	.36	.59	.63	.35	.48
7.5	.28	.47	.50	.26	.39
8.5	.23	.38	.41	.22	.30
9.5	.13	.33	.32	.16	.21
10.5	.08	.28	.26	.10	.19
11.5	.05	.23	.18	.04	.15

Source: 1989 and 1990 Estimated Motorcycle Population, Motorcycle Industry Council, Inc., Irvine, CA.
Motorcycle Survival Rate Model, an analysis of the data from the 1980 Survey of Motorcycle Ownership and Usage, updated with data from the 1985 Survey of Motorcycle Ownership and Usage and the 1990 Survey of Motorcycle Ownership and Usage, Burke Marketing Research, Inc., Cincinnati, Ohio.



Manufacturers and Distributors

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS AND DISTRIBUTORS

In 1990 the six leading brands distributed in the United States, BMW, Harley-Davidson, Honda, Kawasaki, Suzuki, and Yamaha, accounted for roughly 99% of the nation's estimated 462,000 new motorcycle, scooter, and ATV retail sales.

Four of the six major brands are manufactured primarily in Japan and have been distributing motorcycles in the U.S. for twenty to thirty years. Harley-Davidson and BMW, the third and sixth ranking brands, have been distributing motorcycles in the U.S. for eighty and forty years, respectively. Besides motorcycles, scooters, and ATVs, the six leading U.S. distributors also sell a wide range of other products in the U.S., including automobiles, snowmobiles, golf carts, go carts, power products, and watercraft.

PROFILE OF MAJOR U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

Brand	U.S. Motorcycle Distributor	Motorcycle Manufacturer	Year of U.S. Incorporation	Other Products Sold in U.S.
BMW	BMW of North America, Inc. 300 Chestnut Ridge Road Woodcliff Lake, NJ 07675 (201) 307-4000	BMW Motorrad GmbH & Co. Triebstrasse 32 8000 Munich 50 West Germany	1976	Automobiles
Harley-Davidson	Harley-Davidson Motor Co., Inc 3700 W. Juneau Avenue P.O. Box 653 Milwaukee, WI 53201 (414) 342-4680	Same as distributor	1907	Motorcycle accessories, recreational and specialized vehicles and related products.
Honda	American Honda Motor Co., Inc. 1919 Torrance Boulevard Torrance, CA 90501-2746 (213) 783-2000	Honda Motor Co., Ltd. No. 1-1, 2 Chome, Minami Aoyama Minato-Ku, Tokyo 107, Japan Honda of America Mfg. Inc. 24000 U.S. Route 33 Marysville, Ohio 43040 (Engine Manufacturing Facility) 12500 Meranda Road Ana, Ohio 45302	1959	Automobiles, all-terrain vehicles, motor scooters, accessories for motorcycles and products above, power products (generators, rototillers, outboards, lawnmowers, riding lawnmowers, lawn tractors, snow throwers, water pumps).
Kawasaki	Kawasaki Motors Corp., U.S.A. 9950 Jeronimo Road Irvine, CA 92718-2016 (714) 770-0400	Kawasaki Heavy Industries, Ltd. 1-1, Kawasaki-cho Akashi 673, Hyogoken, Japan Kawasaki Motors Manufacturing 6600 N.W. 27th St. Lincoln, Nebraska 68524	1967	All-terrain vehicles, Jet Ski®, Jet Mate Watercraft, utility vehicles, accessories for motorcycles and products above, small engines, generators, watercraft trailers.
Suzuki	American Suzuki Motor Corp. 3251 East Imperial Hwy. Brea, CA 92621 (714) 996-7040	Suzuki Motor Corporation Hamamatsu-Nishi, P.O. Box 1 432-91 Hamamatsu, Japan	1963	Automobiles, all-terrain vehicles, outboard motors, generators, accessories for motorcycles and products above.
Yamaha	Yamaha Motor Corp., U.S.A. 6555 Katella Ave. Cypress, CA 90630 (714) 761-7300	Yamaha Motor Co., Ltd. 2500 Shingai, Iwata-Shi Shizuoka-Ken, 438 Japan	1960	Snowmobiles, go cart engines, go carts, golf carts, scooters, all-terrain vehicles, outboard engines, water vehicles, stern drives, outdoor power products (generators, snowblowers, lawnmowers), accessories for motorcycles and products above.

Source: Information obtained by the Motorcycle Industry Council from the U.S. distributors above.

OTHER U.S. MOTORCYCLE MANUFACTURERS/ DISTRIBUTORS

While the six major brands accounted for roughly 99% of the 1990 retail sales in the United States, the remaining 1% of new motorcycle and scooter sales are distributed among 20 brands.

Although the U.S. motorcycle market share for most of these brands listed below is quite small, some of these brands are greater contributors to foreign markets.

OTHER 1991 U.S. MOTORCYCLE MANUFACTURERS/DISTRIBUTORS

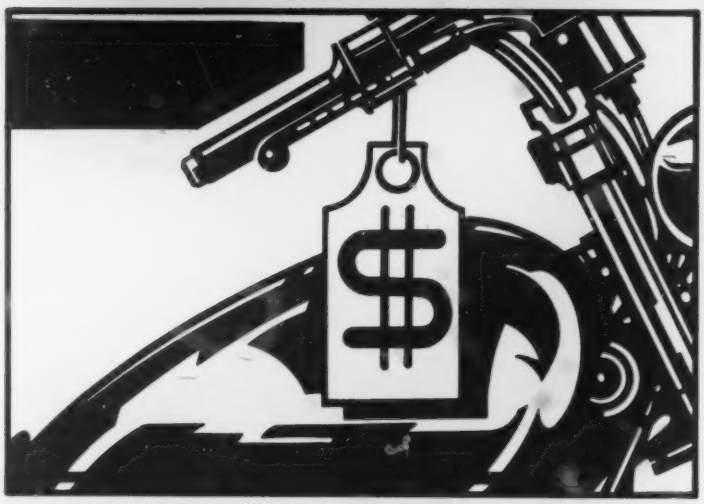
BRAND	PRIMARY U. S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
ATK	ATK Motorcycles, Inc. 5430 Union Pacific Avenue City of Commerce, CA 90022 (213) 722-8880	U.S.
Beta	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Bimota	Cosmopolitan Motors 301 Jacksonville Rd. Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Buell	Buell Motor Company, Inc. 214 Jefferson Street Mukwongo, Wisconsin 53149 (414) 363-3767	U.S.

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Cobra Trike	Cobra Trikes, Inc. 4816 New Chapel Road Jeffersonville, Indiana 47130 (812) 288-6405	U.S.
Derbi	Marina Mobili Inc. P.O. Box 840 Kinnelon, NJ 07405 (201) 838-6100	Spain
Ducati	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07004 (201) 882-9141	Italy
Husqvarna	Cagiva North America, Inc. 5 Washington Avenue Fairfield, NJ 07004 (201) 882-9141	Italy

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Italjet	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Italy
Jawa	American Jawa, Ltd. 185 Express Street Plainview, L.I., New York 11803 (516) 938-3210	Czechoslovakia
KTM	KTM America 1906 Broadway Lorain, Ohio 44052 (216) 244-2726	Austria
Lambretta	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain
Maely	Maely Industries 8580 Bedford Motorway Corona, California 91719 (714) 277-8989	U.S.
Montesa	Cosmopolitan Motors 301 Jacksonville Road Hatboro, Pennsylvania 19040 (215) 672-9100	Spain

BRAND	PRIMARY U.S. MANUFACTURER/DISTRIBUTOR	COUNTRY OF MANUFACTURE
Moto Guzzi	Moto America, Inc. 1000 Main Street Lillington, NC 27546 (919) 893-6647	Italy
Motomarina	Marina Mobili Inc. P.O. Box 840 Kinnelon, New Jersey 07405 (201) 838-6100	Italy
Moto Morini	Herdan Corporation Route 61 Port Clinton, Pennsylvania 19549 (215) 562-3155	Italy
Riva	Yamaha Motor Corp., U.S.A. 6555 Katella Avenue Cypress, California 90630 (714) 761-7300	Japan
Strociek	Strociek Engineering 10485 Product Drive Rockford, Illinois 61111 (815) 654-0141	U.S.
Triumph	Triumph Motorcycles Ltd. Jacknell Road, Dodwells Bridge Industrial Estate, Hinckley Leicestershire, England LE103BS (0455) 251600	England

NOTE: This list includes only those companies manufacturing and/or distributing motorcycles in the U.S. as of June 4, 1991. Although this information was obtained from the most authoritative sources available (individual companies were contacted by the Motorcycle Industry Council), the Motorcycle Industry Council is not responsible for accuracy or completeness.



The Retail Marketplace

MOTORCYCLE RETAIL OUTLETS, EMPLOYEES, AND PAYROLL

Of the estimated 9,625 retail outlets selling motorcycles and related products in the U.S. in 1991, 37% are retail outlets franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs), and 63% are retail outlets specializing in motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters or ATVs.

Motorcycle retail outlets employ an estimated 46,006 employees at an estimated annual payroll of $756 million, including owner and manager salaries and advances.

In most states, franchised retail motorcycle dealers have formed nonprofit associations to engage in government relations and other activities for the good of the motorcycle industry in their state. The MIC recognizes and supports these state associations with several information exchange programs. The addresses of the state associations are listed on pages 45-46 of this publication.

	1991 Franchised Motorcycle Retail Outlets			1991 Non-Franchised Motorcycle Retail Outlets			1991 Total Motorcycle Retail Outlets		
	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)	# Of Outlets	Est. # Of Employees	Est. Annual Employee Payroll ($000's)
Total U.S.	3,533	26,799	$ 485,355	6,092	19,207	$ 270,833	9,625	46,006	$ 756,188
State									
Alabama	61	461	$ 7,953	52	174	$ 2,359	113	635	$ 10,312
Alaska	27	228	4,187	13	48	819	40	276	5,006
Arizona	46	389	7,134	86	318	5,416	132	707	12,550
Arkansas	51	385	6,649	53	178	2,404	104	563	9,053
California	363	3,067	56,293	702	2,597	44,211	1,065	5,664	100,504
Colorado	69	583	10,700	90	333	5,658	159	916	16,358
Connecticut	37	290	5,813	63	189	2,549	100	479	8,362
Delaware	8	63	1,257	15	45	607	23	108	1,864
D.C.	0	0	0	2	6	81	2	6	81
Florida	128	966	16,688	291	975	13,200	419	1,941	29,888
Georgia	82	619	10,691	98	328	4,445	180	947	15,136
Hawaii	8	68	1,241	19	70	1,197	27	138	2,438
Idaho	41	346	6,358	50	185	3,149	91	531	9,507
Illinois	137	918	15,851	264	726	9,064	401	1,644	24,915
Indiana	86	576	9,951	193	531	6,626	279	1,107	16,577
Iowa	63	422	7,289	148	407	5,081	211	829	12,370
Kansas	50	335	5,785	92	253	3,159	142	588	8,944
Kentucky	43	325	5,606	107	358	4,854	150	683	10,460
Louisiana	49	370	6,388	66	221	2,994	115	591	9,382
Maine	31	243	4,870	48	144	1,942	79	387	6,812
Maryland	33	259	5,184	72	216	2,913	105	475	8,097
Massachusetts	53	416	8,327	128	384	5,179	181	800	13,506
Michigan	147	985	17,008	245	674	8,411	392	1,659	25,419
Minnesota	84	563	9,719	162	446	5,562	246	1,009	15,281
Mississippi	40	302	5,215	37	124	1,678	77	426	6,893
Missouri	79	529	9,141	107	294	3,674	186	823	12,815
Montana	50	422	7,754	36	133	2,267	86	555	10,021
Nebraska	56	375	6,479	48	132	1,648	104	507	8,127
Nevada	23	194	3,567	31	115	1,952	54	309	5,519
New Hampshire	31	243	4,870	50	150	2,023	81	393	6,893
New Jersey	71	557	11,154	132	396	5,341	203	953	16,495
New Mexico	28	237	4,342	32	118	2,015	60	355	6,357
New York	169	1,327	26,551	361	1,083	14,606	530	2,410	41,157
North Carolina	98	740	12,777	128	429	5,806	226	1,169	18,583
North Dakota	33	221	3,818	24	66	824	57	287	4,642
Ohio	135	905	15,620	468	1,287	16,067	603	2,192	31,687
Oklahoma	47	355	6,128	81	271	3,674	128	626	9,802
Oregon	65	549	10,080	66	244	4,157	131	793	14,237
Pennsylvania	182	1,429	28,593	377	1,131	15,253	559	2,560	43,846
Rhode Island	7	55	1,100	23	69	931	30	124	2,031
South Carolina	41	310	5,345	61	204	2,767	102	514	8,112
South Dakota	33	221	3,818	31	85	1,064	64	306	4,882
Tennessee	72	544	9,387	96	322	4,355	168	866	13,742
Texas	183	1,382	23,859	315	1,055	14,288	498	2,437	38,147
Utah	36	304	5,583	44	163	2,771	80	467	8,354
Vermont	19	149	2,985	29	87	1,173	48	236	4,158
Virginia	71	536	9,257	95	318	4,309	166	854	13,566
Washington	82	693	12,716	107	396	6,739	189	1,089	19,455
West Virginia	36	283	5,656	39	117	1,578	75	400	7,234
Wisconsin	114	764	13,190	194	534	6,660	308	1,298	19,850
Wyoming	35	296	5,428	21	78	1,323	56	374	6,751

Note: A **franchised motorcycle outlet** is defined as a motorcycle retail outlet franchised to sell new motorcycles, scooters, or all-terrain vehicles (ATVs). A **non-franchised motorcycle outlet** is defined as a motorcycle retail outlet specializing in the sale of either motorcycle related parts, accessories, riding apparel, used vehicles, or service, but not franchised to sell new motorcycles, scooters, or ATVs. Because of differences in list sources, direct comparisons should not be made between the number of **non-franchised** outlets each year.

Source: 1991 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1991.
1990 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1991.

MOTORCYCLE OUTLET RETAIL SALES

1990 motorcycle, scooter and ATV related sales and services by all retail outlets nationwide are estimated to be $4.7 billion, of which $3.5 billion were generated by outlets franchised to sell new motorcycles, scooters and ATVs, and $1.1 billion by non-franchised motorcycle outlets which include parts, accessory, used vehicle and service stores.

New motorcycles, scooters, and ATVs represented under half (40%) of the total 1990 related retail sales and services. Parts, accessories, and riding apparel represented about 35%, used vehicles 13%, and service labor 10%. Other related sales, such as insurance premiums and extended warranties, accounted for about 2% of the total motorcycle, scooter and ATV related retail sales and services.

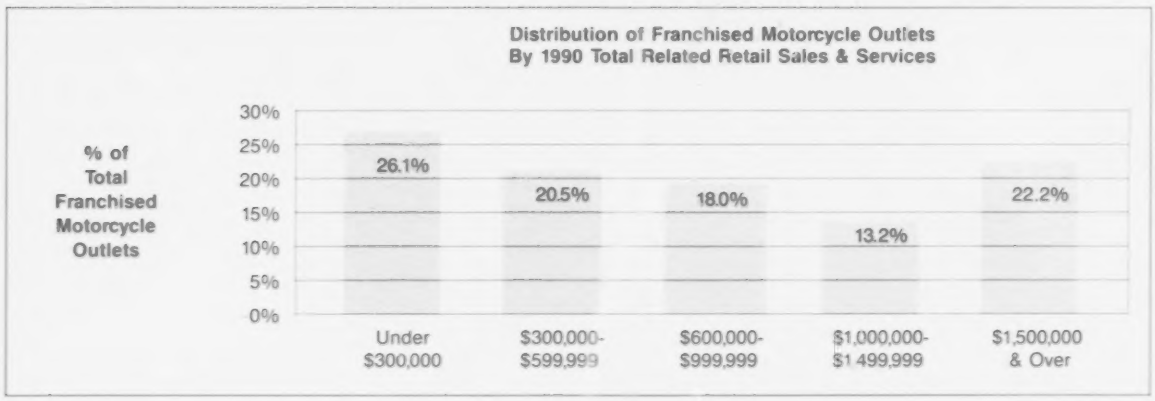
The distribution of franchised and non-franchised motorcycle outlets by the 1990 total motorcycle and ATV related retail sales and services is shown below.

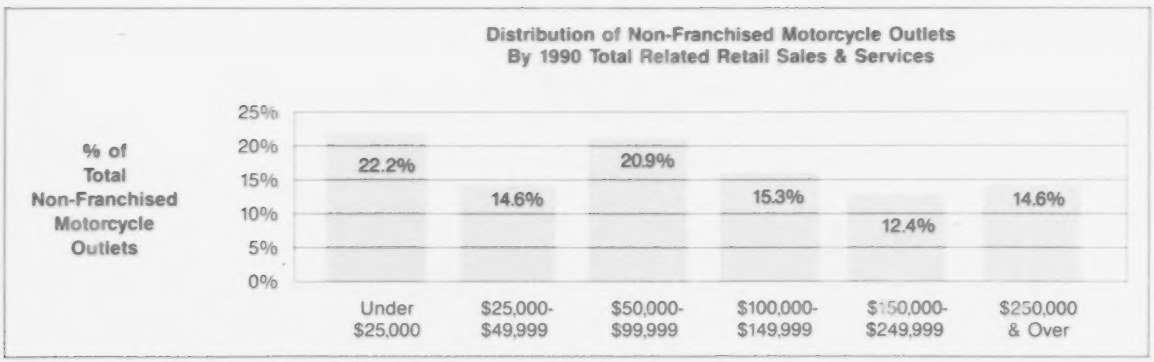
1990 ESTIMATED RETAIL SALES BY U.S. MOTORCYCLE OUTLETS

	1990 Estimated Motorcycle Related Retail Sales					
	Franchised M/C Outlets	% of Total	Non-Franchised M/C Outlets	% of Total	All Motorcycle Retail Outlets	% of Total
New Motorcycles, Scooters & ATVs	$1,837,800,000	51.9%	$ 0	0.0%	$1,837,800,000	39.5%
Used Motorcycles, Scooters & ATVs	506,400,000	14.3%	104,400,000	9.4%	610,800,000	13.1%
Parts, Accessories, & Riding Apparel	853,400,000	24.1%	802,200,000	72.2%	1,655,600,000	35.6%
Service Labor	276,200,000	7.8%	177,800,000	16.0%	454,000,000	9.8%
Other M/C Related Sales	67,200,000	1.9%	26,700,000	2.4%	93,900,000	2.0%
Total M/C Related Sales	$3,541,000,000	100.0%	$ 1,111,100,000	100.0%	$4,652,100,000	100.0%

NOTE: Comparisons can not be made with prior years due to revisions in new vehicle sales estimates and differences in dealer list sources. See page 24 for outlet definitions.

DISTRIBUTION OF MOTORCYCLE OUTLETS BY 1990 RETAIL SALES





Source: 1990 Motorcycle Retail Outlet Audit, Motorcycle Industry Council, Inc., Irvine, California, August 1990.
1990 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1991.

MOTORCYCLE RETAIL OUTLET PROFILE

In 1990 the typical franchised motorcycle outlet employed an average of 7.6 persons annually at an average annual payroll of $137,000. The franchised motorcycle outlet had been in business at the same location for an average of 15 years and under its current ownership for an average of 14 years. Franchised motorcycle outlets sold an average of 84 new and 37 used motorcycle, scooter, and ATV units in 1990. The average total motorcycle related sales and services for a franchised motorcycle outlet was $678,000 in 1990.

In 1990 the typical non-franchised motorcycle outlet employed an average of 3.3 persons annually at an average annual payroll of $44,000. The non-franchised motorcycle outlets had been in business at the same location for an average of 7 years and under its current ownership for an average of 10 years. The average total motorcycle related sales and services for a non-franchised motorcycle outlet was $156,000 in 1990. The distribution by type of motorcycle related sales and services for both franchised and non-franchised outlets is shown below.

1990 MOTORCYCLE RETAIL OUTLET PROFILE

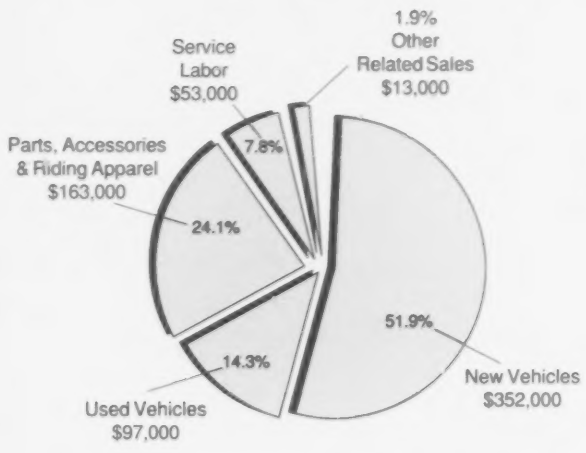
	Franchised M/C Outlet	Non-Franchised M/C Outlet
	Average	Average
Number of Employees	7.6	3.3
Full-Time	6.5	2.3
Part-Time	1.1	1.0
Employee Payroll (Including owner's and mgr's salary and advances)	$137,000	$44,000
Years At Same Location (Under current & previous ownership)	15.0	7.0
Years Under Current Ownership (Whether or not at this location)	14.0	10.0
Advertising & Promotional Expenditures	$8,000	$1,000
New Motorcycle, Scooter, & ATV Unit Sales	84	N/A
Used Motorcycle, Scooter, & ATV Unit Sales	37	N/A
Number of New Brands Carried	1.7	N/A

Note: See page 24 for outlet definitions

DISTRIBUTION OF MOTORCYCLE RELATED SALES PER OUTLET

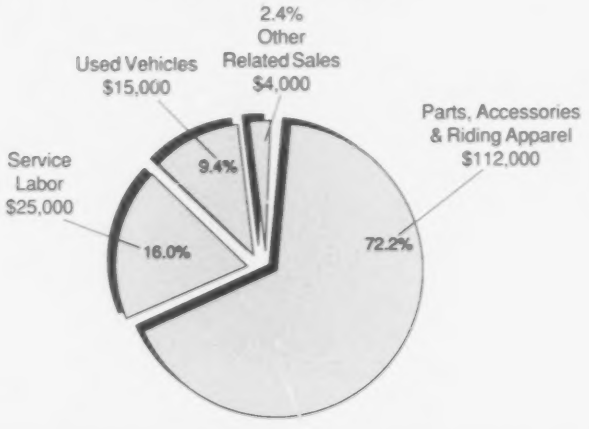
Franchised Motorcycle Outlet

Total — $678,000



Non-Franchised Motorcycle Outlet*

Total — $156,000



* Represents average distribution of sales by all non-franchised outlets combined and may not be typical of individual motorcycle parts, accessory, or service outlets.

Source: 1990 Motorcycle Retail Outlet Profile Survey, Motorcycle Industry Council, Inc., Irvine, California, May 1991.

Motorcycle Usage

U.S. MOTORCYCLE USAGE ON-HIGHWAY AND OFF-HIGHWAY BY STATE

Of the 7.3 million motorcycles, scooters and ATVs in use in 1990, it is estimated that 3.89 million were used on public roads and 3.76 million were used off-highway some of the time.

Of the 3.89 million motorcycles used on-highway, the majority (90%) were on-highway motorcycles. Dual purpose motorcycles accounted for 7% of the motorcycles used on-highway.

Of the 3.76 million motorcycles and ATVs used off-highway at some time, the majority were off-highway motorcycles and ATVs (80%), while dual purpose motorcycles accounted for 13%. Only 7% of the motorcycles used off-highway at some time were on-highway motorcycles.

MOTORCYCLES USED ON AND OFF-HIGHWAY IN 1990

	U.S. Total	Model Type		
		On-Highway	Off-Highway	Dual Purpose
Total Motorcycles in Use (% of total in use)	7,300,000 (100%)	3,650,000 (100%)	2,990,000 (100%)	660,000 (100%)
Motorcycles Used On-Highway at Some Time (% of total in use)	3,888,000 (53%)	3,496,100 (96%)	119,800 (4%)	272,100 (41%)
Motorcycles Used Off-Highway at Some Time (% of total in use)	3,756,000 (51%)	280,900 (8%)	2,990,000 (100%)	485,100 (74%)

MOTORCYCLE USAGE BY STATE IN 1990

State	Total Motorcycles In Use	Motorcycles Used On-Highway At Some Time	Motorcycles Used Off-Highway At Some Time
Alabama	148,700	59,900	96,100
Alaska	38,800	8,700	32,000
Arizona	118,100	60,200	63,800
Arkansas	137,500	45,000	99,000
California	955,800	559,700	443,200
Colorado	108,000	59,000	54,900
Connecticut	81,700	53,400	31,900
Delaware	15,800	8,500	8,100
D.C.	1,600	1,500	100
Florida	314,600	189,600	140,000
Georgia	209,800	95,600	124,000
Hawaii	Not Available		
Idaho	62,300	22,400	43,900
Illinois	262,800	181,000	93,400
Indiana	191,500	117,800	81,800
Iowa	123,500	84,900	43,900
Kansas	70,900	42,600	31,600
Kentucky	95,100	38,500	60,900
Louisiana	131,000	47,500	89,300
Maine	57,000	30,300	29,300
Maryland	97,500	57,800	44,200
Mass.	127,300	81,800	50,900
Michigan	314,000	159,900	167,600
Minnesota	179,100	101,800	85,400
Mississippi	83,800	26,500	61,100
Missouri	142,400	60,200	88,600
Montana	42,700	15,000	30,200
Nebraska	54,500	25,400	31,700
Nevada	45,600	22,900	25,000
N.H.	61,700	37,200	27,200
New Jersey	143,900	84,100	66,300
New Mexico	51,500	26,400	27,900
New York	334,400	202,600	146,800
North Carolina	177,600	77,500	108,200
North Dakota	28,200	14,600	15,100
Ohio	295,500	173,700	134,300
Oklahoma	102,600	50,600	57,800
Oregon	119,100	52,500	72,500
Pennsylvania	298,300	147,500	164,600
Rhode Island	23,800	17,800	7,100
South Carolina	76,000	38,800	40,700
South Dakota	30,400	16,100	15,800
Tennessee	169,100	66,500	110,700
Texas	460,100	259,800	222,100
Utah	87,600	33,100	59,700
Vermont	21,600	10,300	12,200
Virginia	150,300	80,900	76,700
Washington	166,200	88,800	86,000
West Virginia	78,500	23,200	59,100
Wisconsin	187,600	119,600	76,400
Wyoming	24,600	9,000	16,900
U.S. Totals	7,300,000	3,888,000	3,756,000

Note: See page 6 for model type definitions.
Includes scooters and ATVs, and excludes mopeds and nopeds.
1990 estimates are comparable only to 1985, 1984 revised, 1980, and 1979 revised estimates.

Source: 1990 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

Excluding Alaska which is predominantly public land, over one fifth (22%) of the total U.S. acreage, or 413 million acres, is public land managed by Federal and state government. Of this 413 million acres, 87% is in the western states.

In 1990 an estimated 3.8 million motorcycles and ATVs were used for off-highway recreational purposes. In 1990 the off-highway motorcycle and ATV industry generated an estimated $3.1 billion in consumer sales and services, and state taxes and licensing, of which $1.8 billion is attributed to the retail sales of 259,000 new motorcycles and ATVs.

1990 PUBLIC LAND AND OFF-HIGHWAY MOTORCYCLE STATISTICS BY STATE

State	Total Acreage	(1) Public Land Acreage Fed. Gov't.	State Gov't.	% of State	(2) 1990 Sales of New Mcs. Used Off-Hwy At Some Time	(3) Total Mcs. Used Off-Hwy At Some Time	(4) 1990 Est. Annual Economic Value Of Off-Hwy Retail Mrktplace	Off-Hwy Mc. Penetration Off-Hwy Mcs. Per 100 Pop.	Off-Hwy Mcs. Per 1000 Public Acres
	(000)	(000)	(000)				($000)		
Alabama	32,678	1,092	49	3.5	6,300	96,100	$ 73,925	2.3	84.2
Alaska	365,482	318,328	3,237	88.0	2,800	32,000	49,610	5.7	0.1
Arizona	72,688	31,304	36	43.1	3,400	63,800	36,649	1.7	2.0
Arkansas	33,599	3,324	47	10.0	7,000	99,000	90,058	4.1	29.4
California	100,207	46,465	1,277	47.6	31,700	443,200	333,758	1.5	9.3
Colorado	66,486	24,045	287	36.6	4,100	54,900	45,999	1.6	2.3
Connecticut	3,135	14	181	6.2	1,700	31,900	27,210	1.0	163.6
Delaware	1,266	30	12	3.3	800	8,100	12,631	1.2	192.9
Dist. of Columbia	39	11	N/A	28.2	0	100	N/A	0.0	9.1
Florida	34,721	4,261	341	13.3	10,400	140,000	114,115	1.1	30.4
Georgia	37,295	2,030	62	5.6	7,400	124,000	73,878	1.9	59.3
Hawaii	4,106	674	25	17.0	N/A	N/A	N/A	0.0	0.0
Idaho	52,933	33,716	47	63.8	4,200	43,900	57,550	4.3	1.3
Illinois	35,795	500	372	2.4	6,500	93,400	78,620	0.8	107.1
Indiana	23,158	437	57	2.1	4,700	81,800	48,906	1.5	165.6
Iowa	35,860	160	52	0.6	2,900	43,900	36,661	1.6	207.1
Kansas	52,511	581	35	1.2	1,800	31,600	26,702	1.3	51.3
Kentucky	25,512	1,401	42	5.7	5,900	60,900	70,793	1.6	42.2
Louisiana	28,868	1,142	38	4.1	6,100	89,300	76,137	2.0	75.7
Maine	19,848	150	71	1.1	1,800	29,300	29,061	2.4	132.6
Maryland	6,319	198	283	7.6	3,600	44,200	39,597	0.9	91.9
Massachusetts	5,035	83	267	7.0	2,500	50,900	32,582	0.9	145.4
Michigan	36,492	3,528	257	10.4	10,400	167,600	124,186	1.8	44.3
Minnesota	51,206	3,460	3,441	13.5	6,500	85,400	84,074	2.0	12.4
Mississippi	30,223	1,676	22	5.6	4,600	61,100	71,947	2.3	36.0
Missouri	44,248	2,069	109	4.9	4,800	68,600	59,054	1.7	40.7
Montana	93,271	28,456	52	30.6	2,700	30,200	40,883	3.7	1.1
Nebraska	49,032	714	149	1.8	2,400	31,700	38,843	2.0	36.7
Nevada	70,264	59,790	144	85.3	2,200	25,000	32,339	2.4	0.4
New Hampshire	5,769	740	31	13.4	1,100	27,200	19,260	2.4	35.3
New Jersey	4,813	160	298	9.5	4,100	66,300	44,928	0.8	144.8
New Mexico	77,766	24,342	119	31.5	1,600	27,900	23,342	1.7	1.1
New York	30,681	1,555	258	5.9	9,200	146,800	113,230	0.8	81.0
No. Carolina	31,403	2,210	127	7.4	9,000	108,200	99,046	1.6	46.3
North Dakota	44,452	1,948	17	4.4	900	15,100	16,709	2.3	7.7
Ohio	26,222	318	208	2.0	9,200	134,300	108,879	1.2	255.3
Oklahoma	44,088	822	95	2.1	3,300	57,800	45,884	1.8	63.0
Oregon	61,599	29,971	90	48.8	5,300	72,500	64,831	2.6	2.4
Pennsylvania	28,804	641	276	3.2	12,200	164,600	141,876	1.4	179.5
Rhode Island	677	5	9	2.1	200	7,100	5,588	0.7	507.1
So. Carolina	19,374	1,161	79	6.4	4,100	40,700	55,195	1.2	32.8
So. Dakota	48,882	2,732	92	5.8	1,200	15,800	23,234	2.2	5.6
Tennessee	26,728	1,876	123	7.5	8,000	110,700	86,257	2.2	55.4
Texas	168,218	3,270	225	2.1	12,800	222,100	150,628	1.3	63.5
Utah	52,697	33,535	116	63.9	3,200	59,700	48,826	3.4	1.8
Vermont	5,937	322	170	8.3	400	12,200	8,535	2.2	24.8
Virginia	25,496	2,465	54	9.9	5,000	76,700	50,796	1.3	30.4
Washington	42,694	12,480	234	29.8	7,000	86,000	69,648	1.9	6.8
West Virginia	15,411	1,168	206	8.9	5,300	59,100	66,783	3.2	43.0
Wisconsin	35,011	1,830	120	5.6	5,600	76,400	72,070	1.6	39.2
Wyoming	62,343	30,878	119	49.7	1,100	16,900	22,287	3.4	0.5
U.S. Total	2,271,342	724,068	10,817	32.4	259,000	3,756,000	$ 3,143,600	1.5	5.1

Note: The 1990 sales, population, and economic figures above are not comparable to prior year estimates due to sales and population revisions. Includes competition motorcycles and three and four-wheeled all-terrain vehicles.

Source: (1) Statistical Abstract of the United States, 1990, U.S. Department of Commerce, Bureau of Census. Includes state park and recreation areas only.
(2) Derived from MIC Manufacturers Shipment Reporting System, 1990 Annual Report.
(3) 1990 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
(4) Derived from "Economic Value of the Motorcycle Retail Marketplace, " on page 11, by M.I.C. Includes retail sales of motorcycles and ATVs (new and used) and parts and accessories, dealer servicing, product advertising, vehicle financing charges, insurance premiums, dealer personnel salaries, state sales and dealer personal income taxes, and vehicle registration fees.

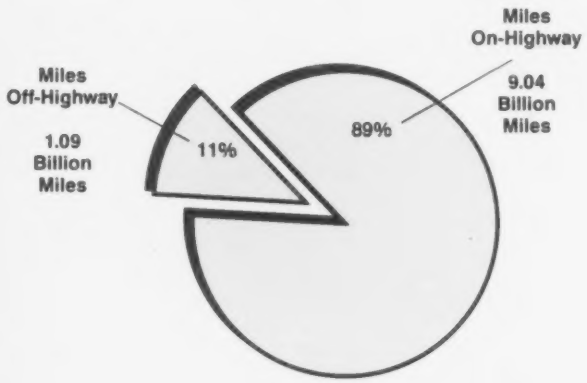
MILES TRAVELED ON AND OFF-HIGHWAY BY MODEL TYPE

It is estimated that the 7.3 million motorcycles, scooters, and ATVs in use traveled roughly 10.1 billion miles (including miles traveled off-highway), compared to an estimated 2,149 billion miles traveled by all other motor vehicles in 1990. 89% of the total motorcycle mileage in 1990 was on public highways and the remaining 11% was off-highway. On-highway motorcycles accounted for the majority (88%) of motorcycle travel, while travel on dual purpose and off-highway motorcycles, including ATVs, represented 4% and 8% respectively.

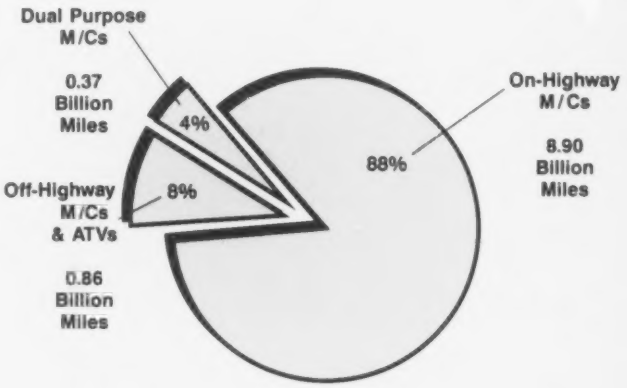
The majority (97%) of motorcycle mileage on public roads was accumulated by on-highway motorcycles, while only 3% of the mileage was traveled on dual purpose motorcycles. Off-highway motorcycles and ATVs accumulated over three fourths (79%) of the miles traveled off-highway, and the remaining 21% was divided between dual purpose motorcycles with 12% and on-highway motorcycles with 9%.

10.1 BILLION MOTORCYCLE MILES TRAVELED IN 1990

Miles On-Highway and Off-Highway



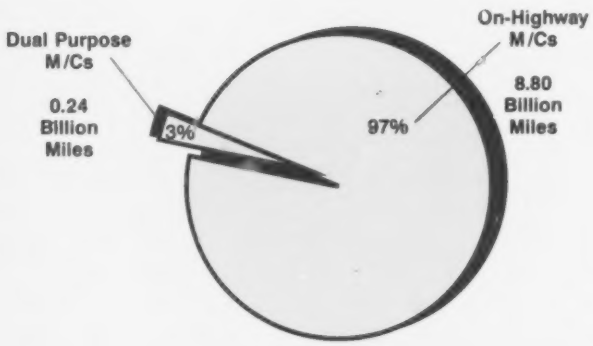
Miles by Model Type



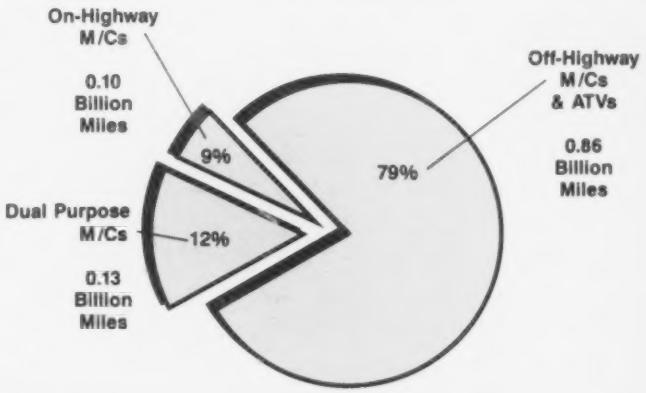
MOTORCYCLE USAGE

ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE

Mileage On-Highway



Mileage Off-Highway



Note: The 1990 estimates are comparable only to 1985, 1984 revised, 1980, and 1979 revised estimates.

Source: Derived by the Motorcycle Industry Council from the following sources:
1990 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
1990 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research,Inc., Cincinnati, Ohio. February 1991.

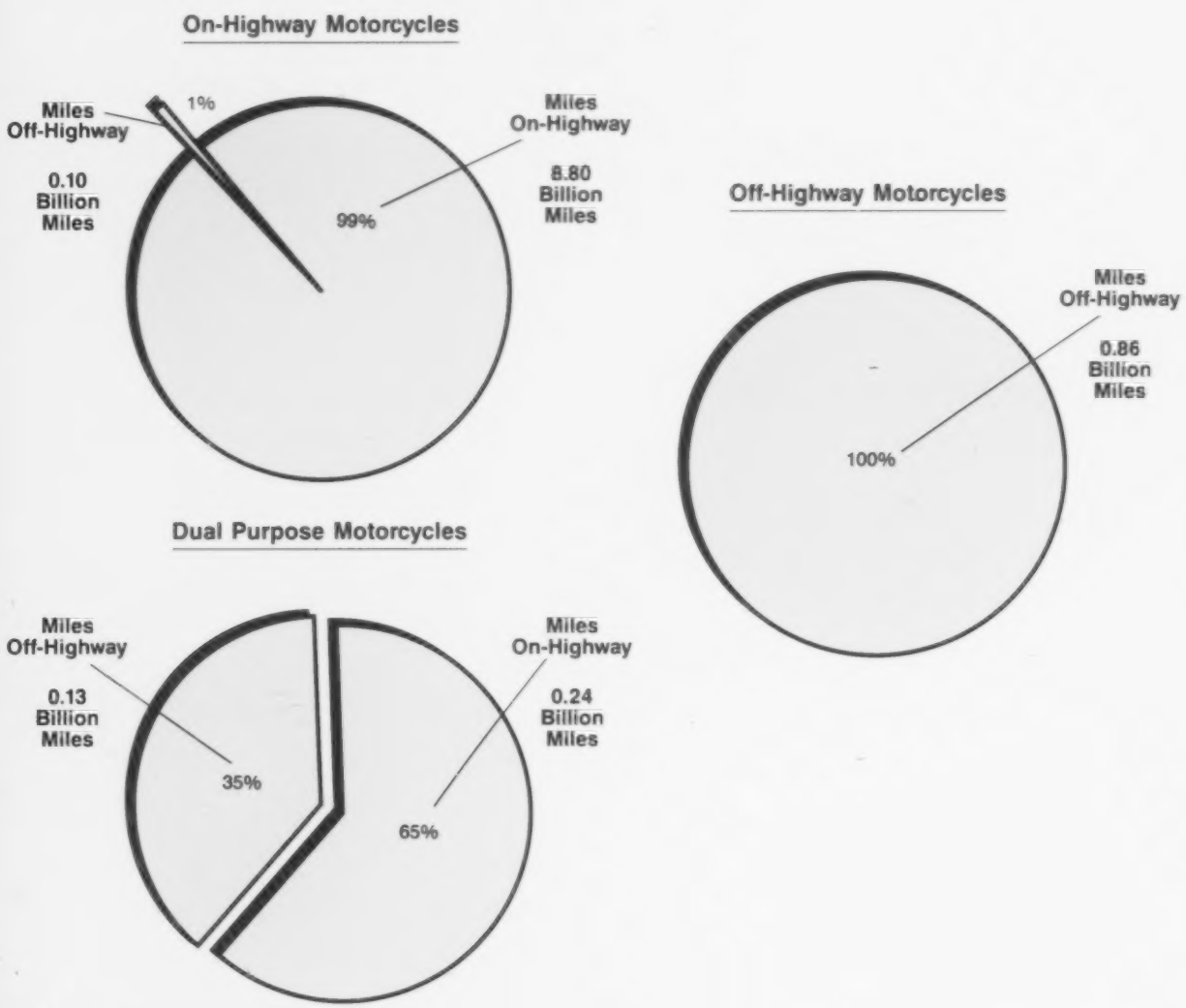
MILES TRAVELED BY MODEL TYPE FOR ON AND OFF-HIGHWAY

Of the total miles traveled by on-highway motorcycles in 1990, it is estimated that 99% was on public highways and the remaining 1% off-highway.

It is assumed that all of the mileage by off-highway motorcycles and ATVs was off public roads since these vehicles do not comply with the Federal Motor Vehicle Safety Standards for use on public roads.

Mileage by dual purpose motorcycles was somewhat greater on-highway (65%) than mileage off-highway (35%) in 1990.

ON & OFF-HIGHWAY MILEAGE BY MODEL TYPE



Note: The 1990 estimates are comparable only to 1985, 1984 revised, 1980, and 1979 revised estimates.

Source: Derived by the Motorcycle Industry Council from the following sources:
1990 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.
1990 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1991.

MOTORCYCLE AVERAGE ANNUAL MILEAGE

In 1990 motorcycles ridden on-highway traveled an average of 2,399 miles. On-highway motorcycles tend to travel almost three times the distance traveled by dual purpose motorcycles on public highways. Motorcycles and ATVs ridden off-highway traveled an average of 290 miles in 1990. Off-highway motorcycles and ATVs combined tend to travel about the same distance off-highway as dual purpose motorcycles.

Based on 1990 consumer research, the majority of on-highway (80%) and off-highway (69%) riding occurred in the spring and summer. Riding in rural areas accounted for 38% of the miles ridden on-highway and 81% of the miles ridden off-highway. Weekend riding accounted for about half (52%) of on-highway riding and two thirds (68%) of off-highway riding.

AVERAGE ANNUAL MILEAGE TRAVELED IN 1990

Average Annual Mileage Traveled in 1990	Total Motorcycles	On-Highway Motorcycles	Off-Highway Motorcycles & ATVs	Dual Purpose Motorcycles
On-Highway	2,399	2,517	—	889
Off-Highway	290	343	288	276

ANNUAL MILEAGE BY SEASON, RIDING AREA, WEEKENDS

	Average % of Annual Mileage*	
	On-Highway	Off-Highway
By Season		
Spring	28%	27%
Summer	52%	42%
Fall	16%	20%
Winter	4%	12%
By Riding Area		
Major Cities	23%	3%
Suburban Areas	39%	16%
Rural Areas	38%	81%
On Weekends	52%	68%

*Percentages are mean averages and therefore do not always add up to 100%.

Source: 1990 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1991.
1990 Estimated Motorcycle Population and Usage, Motorcycle Industry Council, Inc., Irvine, CA.

ON-HIGHWAY MOTORCYCLE FUEL ECONOMY AND COMMUTING

On average, motorcycles used on-highway are more fuel-efficient than most new automobiles. Motorcycles used on-highway travel from about 43 to 120 miles per gallon of gasoline, depending on the size of the engine.

Of the 3.9 million owners who used their motorcycles on-highway, an estimated 2.2 million used their motorcycle for commuting at some time in 1990. Of these owners, an estimated 404,000 used their motorcycle as a primary means of transportation in 1990.

1991 MOTORCYCLE FUEL ECONOMY FIGURES

	Estimated Average Miles Per Gallon*	
Engine Displacement	On-Highway Motorcycles	Dual Purpose Motorcycles
Under 125 cc	120	119
125-349 cc	86	79
350-449 cc	49	64
450-749 cc	54	61
Over 749 cc	43	—

* Derived from manufacturer exhaust emission test results. The U.S. EPA requires manufacturers to certify exhaust emissions for all 50 cc and greater on-highway and dual purpose motorcycles. The EPA does not require fuel economy testing for motorcycles. However, fuel economy figures can be derived from the exhaust emission test results. MPG figures were derived in this way from 50, 1991 test vehicles produced by the four leading manufacturers which represent about 81% of the motorcycle sales nationwide.

MOTORCYCLE COMMUTING

Estimated number of owners who used their motorcycle as primary means of transportation in 1990	404,000
Estimated number of owners who used their motorcycle for commuting at some time during the past 12 months	2,173,000

Source: MPG figures derived from tests performed by manufacturers in accordance with the U.S. EPA motorcycle exhaust emission certification test procedures.

1990 Survey of Motorcycle Ownership and [illegible] conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1991.

MOTORCYCLE RIDER EDUCATION PROGRAMS

It has become apparent in recent years that rider education and training are important steps in motorcycle accident prevention. Motorcycle accident statistics indicate that a substantial percentage of such accidents involve riders with limited experience and training.

Prior to 1973 there were few organized education and training programs to instruct beginners in safe motorcycle operation. Since 1973, the Motorcycle Safety Foundation (MSF), a private nonprofit traffic safety organization, has been successful in developing a motorcycle rider education program which includes instructor preparation and classroom and on-cycle rider instruction and is available to the public, as well as private schools and organizations.

MOTORCYCLE SAFETY FOUNDATION RIDER EDUCATION PROGRAMS

The Motorcycle Safety Foundation's beginning rider education program curriculum, known as the *Motorcycle RiderCourse: Riding and Street Skills* (MRC:RSS) is research-based and field-evaluated. It offers the latest in teaching techniques and instructional guidelines, as well as providing a complete set of educational materials.

The introductory course for new motorcyclists was published in 1976 as the Motorcycle Rider Course (MRC). A revised MRC, the Motorcycle RiderCourse:Riding and Street Skills (MRC:RSS) was introduced in 1986. The MRC:RSS is presently used nationally by state agencies, all branches of the military, and independent sponsors. The Experienced RiderCourse, released in January, 1989, is also available. For the nearest course location, call toll free (800) 447-4700.

Trained Instructors play an important part in the success of a rider education course. MSF Chief Instructors have trained close to 15,900 Instructors since 1973. Instructors complete a course of instruction that includes performance evaluation as a teacher and a motorcycle rider.

Motorcycle manufacturers and dealers cooperate by making motorcycles available for student use in the MRC:RSS training programs. 2,750 motorcycles were loaned to MSF recognized sponsors in 1990.

Through these combined efforts motorcyclists have an opportunity to learn to ride safely. Courses meeting MSF minimum standards have prepared over 808,000 students since the program originated in 1973.

Most courses are now supported, in part, with funds generated by state legislation and administered by a state agency. The Foundation's goal is to continue this quality rider education effort for the benefit of the motorcycle riding public.

Instructor Preparation

131 Chief Instructors prepared Instructors with MSF materials in 1990.

15,856 Instructors have been prepared with MSF assistance since 1973.

Rider Education Programs

Over 808,000 students have completed courses meeting MSF standards since 1973.

855 sites offered MSF rider education courses in 1990.

657 were public sites and 198 were military sites.

The MSF rider education programs are available in most states.

Source: Motorcycle Safety Foundation, Irvine, California

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

Many state motorcycle rider education programs are supported, in part, with funds provided by state legislation. In recent years a number of states have recognized the benefits of motorcycle rider education, and have enacted legislation to provide motorcycle safety programs. Thus far, 39 states have passed motorcycle rider education legislation. Funding for these programs is obtained through motorcycle license or registration fees, or from special legislative appropriations.

STATE MOTORCYCLE RIDER EDUCATION PROGRAMS

State	MSF Recognized Rider Education Sites in 1990	Military Course Graduates in 1990	Civilian Course Graduates in 1990	MSF Rider Education Instructors Active in 1990	State Legislation For Rider Education Programs (Effective Date)	Estimated Annual State Funding
Alabama	8	394	297	40	Yes (8/8/87)	$190,000
Alaska	5	200	114	19	No	None
Arizona	19	664	654	70	Yes (7/24/81)	$ 76,000
Arkansas	5	135	104	25	No	None
California	80	3,512	7,717	454	Yes (1/1/86)	$ 1.3 mil
Colorado	8	238	882	53	Yes (7/1/90)	$276,200
Connecticut	11	121	1,137	76	Yes (7/1/82)	$118,000
Delaware	4	109	349	30	Yes (7/1/85)	$ 82,000
District of Columbia	3	107	147	8	No	None
Florida	33	1,506	2,926	206	Yes (10/1/87)	$586,000
Georgia	18	429	896	72	Yes (1/1/85)	$226,000
Hawaii	8	877	702	23	Yes (Amended '88)	$ 23,000
Idaho	2	106	12	19	No	None
Illinois	40	—	6,969	245	Yes (1/1/82)	$ 1.2 mil
Indiana	13	93	2,293	136	Yes (1/1/87)	$200,000
Iowa	41	—	1,432	107	Yes (7/1/87)	$250,000
Kansas	12	406	117	37	Yes (9/1/82)	$ 98,000
Kentucky	10	645	294	36	No	None
Louisiana	6	118	119	27	Yes (7/6/87)	$102,000
Maine	8	83	1,184	28	Yes (7/16/86)	$ 72,000
Maryland	14	173	4,115	149	Yes (7/1/83)	$550,000
Massachusetts	8	66	938	45	Yes (4/7/87)	$190,000
Michigan	59	122	2,997	173	Yes (1/1/84)	$650,000
Minnesota	110	—	1,778	107	Yes (7/1/82)	$500,000
Mississippi	4	237	20	22	No	None
Missouri	8	210	378	73	No	None
Montana	9	70	94	24	Yes (7/1/90)	$ 50,000
Nebraska	10	37	279	28	Yes (8/15/81)	$ 80,000
Nevada	4	183	319	19	No	None
New Hampshire	2	—	70	15	Yes (7/1/89)	$150,000
New Jersey	5	82	593	37	No	None
New Mexico	5	265	891	66	Yes (7/1/83)	$ 71,000
New York	16	303	536	136	No	None
North Carolina	16	610	387	76	Yes (10/1/89)	$192,000
North Dakota	8	164	539	39	Yes (1/1/80)	$120,000
Ohio	28	135	2,292	178	Yes (3/11/87)	$ 1.0 mil
Oklahoma	8	363	245	34	No	None
Oregon	6	—	1,422	51	Yes (10/15/83)	$300,000
Pennsylvania	28	63	9,302	112	Yes (7/1/84)	$ 1.0 mil
Rhode Island	3	155	2,530	20	Yes (1/1/79)	$130,000
South Carolina	9	808	2	35	Yes (6/11/90)	None
South Dakota	22	128	320	15	Yes (7/1/82)	$ 47,000
Tennessee	7	126	359	51	Yes (7/1/88)	$214,000
Texas	49	1,307	3,070	182	Yes (9/1/83)	$ 1.0 mil
Utah	9	156	155	22	Yes (4/23/90)	None
Vermont	1	—	90	8	Yes (6/21/90)	$ 90,000
Virginia	26	452	1,954	180	Yes (5/1/85)	$199,000
Washington	24	158	2,381	107	Yes (6/10/82)	$500,000
West Virginia	0	—	—	7	Yes (7/1/92)	$ 58,000
Wisconsin	20	12	1,452	97	Yes (5/1/82)	$159,500
Wyoming	3	100	32	9	No	None
TOTAL U.S. *	855	16,228	67,885	3,828		

* Excludes military totals overseas.

Source: Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

Each year the Motorcycle Safety Foundation surveys the licensing authorities in the nation's 51 licensing jurisdictions on motorcycle operator licensing programs.

The table below summarizes the use of MSF materials in the state motorcycle operator licensing programs. The Foundation's licensing department provides technical assistance and examiner training for states adopting the MSF approved tests.

1990 STATE MOTORCYCLE OPERATOR LICENSING PROGRAMS

MOTORCYCLE USAGE

1990 STATE	TYPE OF SKILL TEST	MOM ADOPTION	MOM KNOWLEDGE TEST	WAIVER FOR RIDER EDUCATION	NUMBER OF MOTORCYCLE TESTING SITES	NUMBER OF DRIVER LICENSE EXAMINERS	NUMBER OF LICENSED DRIVERS (AS OF 6-30-90)	NUMBER OF LICENSED MOTORCYCLE OPERATORS (AS OF 6-20-90)
Alabama	None	Yes	No	N	73	133	2,906,559	4,821
Alaska	MOST/Alternate	Yes	No	N	32	36	364,989	N/A
Arizona	MOST/Alternate/MLST	Yes	Yes	N	16	180	2,416,057	153,884
Arkansas	Off-Street	No	No	N	50	25	1,717,578	63,372
California	Lollipop	Yes	Yes	N	176	529	19,577,100	847,370
Colorado	Alternate/On-Street	Yes	Yes	S	70	154	2,761,035	336,000
Connecticut	Alternate	Yes	Yes	N	13	54	2,969,529	168,299
Delaware	Alternate	Yes	No	K,S	3	22	660,000	30,949
D.C.	Alternate	No	No	N	1	6	400,000	12,105
Florida	MOST/Alternate	Yes	Yes	K,S	77	880	11,109,288	413,255
Georgia	MLST	Yes	Yes	K,S	25	270	4,511,548	204,616
Hawaii	Alternate	No	No	N	13	55	657,156	21,656
Idaho	None	No	No	N/A	N/A	N/A	755,969	N/A
Illinois	Alternate/Off-Street	Yes	Yes	S	105	530	7,699,486	540,080
Indiana	Alternate	Yes	No	S	34	85	4,754,178	224,226
Iowa	Off-Street	Yes	No	S	143	36	1,976,726	254,780
Kansas	Off-Street	Yes	Yes	K,S	130	156	1,725,938	226,830
Kentucky	Off-Street/On-Street	No	No	N	120	100	2,390,601	87,316
Louisiana	Off-Street	Yes	Yes	S	80	376	2,613,827	61,219
Maine	Alternate MIT	No	No	N	29	32	866,728	91,552
Maryland	Alternate	Yes	No	N	14	130	3,182,258	166,620
Massachusetts	Off-Street	No	No	N	30	100	4,200,000	1,000
Michigan	Alternate	Yes	Yes	S	75	1,200	6,417,893	413,980
Minnesota	Alternate	Yes	No	N	99	114	3,096,916	289,996
Mississippi	Alternate MIT	Yes	Yes	N	82	47	2,009,323	UNK
Missouri	Off-Street	Yes	No	N	125	174	3,545,802	253,908
Montana	Alternate	Yes	Yes	N	56	30	680,000	68,000
Nebraska	Alt. MOST/ MIT	Yes	Yes	K,S	96	70	1,300,000	42,900
Nevada	MLST/Off-Street	Yes	Yes	S	7	23	818,314	40,367
New Hampshire	Alternate	No	No	S	10	23	799,616	89,297
New Jersey	Alternate	Yes	No	N	11	200	5,500,000	250,000
New Mexico	MOST/MLST	Yes	Yes	K,S	60	100	1,071,407	1124
New York	Off/On-Street	Yes	No	N	100	150	10,177,995	471,013
North Carolina	Off-Street	No	No	N	175	388	4,484,595	237,427
North Dakota	Alternate	Yes	Yes	N	45	32	428,812	36,372
Ohio	Off-Street	Yes	No	N	94	220	7,274,129	550,266
Oklahoma	Alternate MIT	No	No	N	93	64	2,292,867	UNK
Oregon	Alternate	Yes	Yes	N	45	170	2,300,000	204,287
Pennsylvania	Off-Street	Yes	No	K,S	83	115	7,796,615	459,211
Rhode Island	Off-Street	Yes	N/A	N	N/A	9	825,500	53,052
South Carolina	Off-Street	No	Yes	N	60	120	2,376,659	66,341
South Dakota	MOST/Alternate	Yes	No	K,S	80	45	450,000	45,844
Tennessee	Off-Street	No	No	S	N/A	N/A	N/A	125,000
Texas	Alternate MIT	Yes	No	N	345	408	11,738,602	681,668
Utah	Alternate/MLST	Yes	Yes	N	15	62	1,200,000	76,000
Vermont	Alternate	No	No	N	10	13	423,812	45,752
Virginia	Alternate/Off-Street	Yes	Yes	S	14	220	4,249,563	215,588
Washington	Alternate	Yes	Yes	N	57	294	3,272,953	256,630
West Virginia	None	No	No	N/A	N/A	70	1,306,440	N/A
Wisconsin	Alternate MIT	Yes	Yes	N	125	200	3,377,446	309,726
Wyoming	Alternate	Yes	Yes	N	34	85	333,493	36,829
U.S. TOTAL	Not Applicable	37	23	N/A	3,230	8,535	169,765,302	9,240,548

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart. Although this information was obtained from the most authoritative sources available as of July 1990, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

*Exceptions to the rule.
1. Only if greater than 2 brake horsepower

Parts Of Motorcycle Test Waived for RiderCourse Graduates
P — Partial K — Knowledge
N — None S — Skill

MOST - Motorcycle Operator Skill Test
MIT - Motorcyclist In-Traffic Test
MLST - Motorcyclist Licensing Skill Test
ALTERNATE - Alternate MOST
ALTERNATE MIT - State Specific In-Traffic Test

The Motorcycle Operator Manual (MOM)
The *Motorcycle Operator Manual (MOM)* includes information on proper protective gear, handling different road surfaces and reacting to emergencies. License applicants in a study group increased their knowledge 15 percent by reading the manual. MSF provides free printer's negatives on a loan basis to states adopting the manual.

The Motorcycle Knowledge Test
The Motorcycle Knowledge Test was developed from the contents of the *Motorcycle Operator Manual*. Using multiple choice questions and line drawings, the test emphasizes areas critical to safe riding. MSF will provide a set of tests and slides for duplication to states using automated testing machines.

The Motorcycle Skill Test Practice Guide
The Practice Guide is designed to provide motorcycle license applicants with a series of exercises that they can practice in a parking lot before they take their skills test. These exercises are not meant to replace a rider education course but simply to provide practice on necessary skills before testing. MSF provides free printer's negatives on a loan basis for states that would like to provide this booklet to motorcycle applicants.

The Sharing The Road With Motorcycles Information
Studies have shown that most motorcycle accidents are caused by drivers of other vehicles. MSF has developed information for state driver's manuals titled *Sharing The Road With Motorcycles*. It gives other drivers information on conditions and situations commonly faced by motorcyclists.

The Motorcycle Operator Skill Test (MOST)
Nearly three years of research resulted in the development of a new motorcycle operator testing procedure. Research shows the test works. In comparison with an existing state test, the Motorcycle Operator Skill Test (MOST) showed a 15 percent reduction in accidents. When coupled with a rider training program, accidents were reduced 21 percent.

The MOST contains nine exercises that test the skills riders need to operate safely in traffic. Since the test only requires an area 50 x 125 feet, it can be set up in a parking lot. The MOST has been proven to be effective. Some states, however, do not have enough space available to adopt the MOST. The Alternate MOST was developed specifically for these areas. It includes modified portions of important MOST exercises along with other basic control skills.

The Alternate Motorcycle Operator Skill Test (Alternate MOST)
The Alternate MOST was developed specifically for those areas with limited space available. It employs the use of manual timing equipment. Seven exercises test basic and collision avoidance skills in an off-street setting.

The Motorcyclist Licensing Skill Test (MLST)
The MLST is the most recently developed off-street test. It draws on lessons learned from tests that had come before it. This test combines administrative practicality with test reliability and rider safety. Applicants are required to complete one basic control exercise and two collision-avoidance skills. Objective criteria is used to evaluate riding performance.

The Motorcyclist In-Traffic Test (MIT)
Several states prefer to administer an in-traffic test. The MIT consists of 21 test situations, involves zone scoring, and planned observations. The applicant is scored by an examiner following the motorcycle in another vehicle.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1991, Motorcycle Safety Foundation, Irvine, California.

STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

Program efforts and improvements in licensing as well as education are needed to help reduce motorcycle accidents, deaths and injuries. The Motorcycle Safety Foundation has aided in this effort through the development of improved motorcycle operator licensing examinations and the training of state licensing personnel.

Current licensing requirements and procedures by state, for 1990, are outlined below. Nearly all states require a special motorcycle license or endorsement for all individuals, regardless of age, and have special knowledge and skill tests for motorcycle operators. The minimum age for obtaining a motorcycle license ranges from 13 to 21.

1990 STATE MOTORCYCLE OPERATOR LICENSING PROCEDURES

1990 STATE	SPECIAL LICENSE OR ENDORSEMENT CODE	DURATION OF LICENSE	LENGTH OF TIME REQUIRED TO HOLD PERMIT	LENGTH OF TIME PERMIT IS VALID	MINIMUM AGE FOR A M/C LICENSE WITHOUT DRIVER EDUCATION	MINIMUM AGE FOR A M/C LICENSE WITH DRIVER EDUCATION	RIDER EDUCATION PREREQUISITE TO LICENSING	SKILL TEST ADMINISTERED ON APPOINTMENT (APPT) OR WALK-IN (WI) BASIS
Alabama	MDC - C	4	No	N/A	14[4]	N/A	No	N/A
Alaska	M1	5	No	2 years	16	16	No	APPT
Arizona	M	No	6 months	6 months	16	16	No	APPT/WI
Arkansas	M	2-4	No	N/A	16	16	No	WI
California	M1, M2	4	Yes	1 year	21	16	Under 21	APPT
Colorado	M	5	90 days	180 days	16	16	No	APPT/WI
Connecticut	104-7, 204-7, 10S-20S	No	No	60 Days	18	16	Ages 16-17	APPT
Delaware	M	Life	10 days	60 days	18	16	Ages 16-17	WI
D.C.	6,7	4	No	60 days	16	16	No	APPT
Florida	W,T,MICYALSO	4-6[11]	No	90 days	21	15[10]	Under 21	APPT
Georgia	M	4	No	6 months	16	16	No	WI
Hawaii	2	2-4	No	90 days	15[1]	15[1]	No	WI
Idaho	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Illinois	M,L	4	No	1 year	18	16[3]	Ages 16-17	WI
Indiana	MC	2-4	30 days	1 year	16	16	No	WI
Iowa	M,8	2-4[2]	No	2 years	18	16	Ages 16-17	APPT
Kansas	D	4	No	6 months	14	14	No	WI
Kentucky	M	N/A	30 days	6 months	16	16	No	APPT
Louisiana	7,M	N/A	No	N/A	15	15	No	WI
Maine	I,D	4	No	1 year	21	16	Ages 16-20	APPT
Maryland	E,M	4	14 days	180 days	18	16	Ages 16-17	WI
Massachusetts	M	4	No	1 year	17	16 1/2	No	APPT
Michigan	CY	4	No	150 days	18	16	Ages 16-17	APPT
Minnesota	M	4	No	45 days	18	16	Ages 16-17	APPT/WI
Mississippi	E	4	Yes	60 days	15	15	No	WI
Missouri	M	3	No	6 months	16	16	No	WI
Montana	M	4	No	6 months	16	15	No	APPT
Nebraska	M	4	No	1 year	16	16	No	APPT
Nevada	Class 4	4	No	8 months	16	16	No	APPT/WI
New Hampshire	MC	4	No	30 days	18	16	No	APPT
New Jersey	E,F	4	20 days	90 days	17	17	No	APPT
New Mexico	MZ,MY,MW	4	No	6 months	16	13[6]	No	WI
New York	Class 7	4	No	1 year	16	16	No	APPT
North Carolina	MT CYCLE	4	N/A	N/A	18	16	No	APPT/WI
North Dakota	M	4	2 months[5]	6 months	16	14[5]	Ages 14-15	APPT
Ohio	M,M1,M3	4	None	6 months	18	16	Ages 16-17	APPT
Oklahoma	None	N/A	30 days	4 Years	14[12]	14[12]	No	WI
Oregon	M-1,M-2	4	No	1 year	19	16	Ages 16-18	APPT
Pennsylvania	Class 5, M	4	No	120 days	16	16	No	WI
Rhode Island	Class H	5	Yes	30 days	N/A	16	All	N/A
South Carolina	Class 4, M	4	15 days	6 months	16	16	No	APPT/WI
South Dakota	Class 2,3	4	No	N/A	14[8]	14[8]	No	WI
Tennessee	Class M	4	No	1 year	16	16	No	WI
Texas	Class M	4	No	1 year	18	15[7]	Ages 15-17	WI
Utah	M 104,110	4	No	6 months	N/A	16	No	WI
Vermont	1M,1A,1B	N/A[11]	No	60 days	18	16	No	APPT
Virginia	C	5	No	N/A	18	16	No	WI
Washington	1,2 or 3	4	No	90 days	16	16	Ages 16-17	APPT
West Virginia	Yes	Unknown	N/A	N/A	N/A	N/A	No	N/A
Wisconsin	CIP,PCY,RCY	No limit	10 days	6 months	18	16	No	APPT/WI
Wyoming	M	4	No	1 year	16	16	No	APPT/WI

1 - Restricted to 125cc or less, helmet usage under 18 years of age
2 - Valid 2 years if between 15-24 or 65 and over; valid 4 years if 25-64 years old
3 - 16-18 restricted to 250cc
4 - 14 & 15 year-olds restricted to 125CC
5 - For 14 & 15-year-olds
6 - Restricted to 250cc or less for 14 & 15-year-olds
7 - 15-year-olds restricted to under 125cc
8 - Restricted to 125cc or less
9 - Can only drive between 6 a.m. - 8 p.m.
10 - Restricted to 150cc until age 16
11 - 6-year renewal for safe driver
12 - Under 16 restricted to 125cc or less

This information was assembled by the Motorcycle Safety Foundation licensing department. Licensing authorities in all 50 states and the District of Columbia were directly contacted by MSF for an update on the information listed in this chart.
Although this information was obtained from the most authoritative sources available as of July 1990, the Motorcycle Safety Foundation is not responsible for its accuracy or completeness.

Source: Cycle Safety Info, State Motorcycle Operator Licensing — 1991, Motorcycle Safety Foundation, Irvine, California.

MOTORCYCLE ACCIDENT STATISTICS BY STATE

The Motorcycle Safety Foundation has compiled the following motorcycle accident statistics for 1990 from state sources.

In 1990 the number of reported motorcycle accidents decreased 2.5%, while fatalities increased 2.2% compared to 1989. The number of accidents per 10,000 registrations rose by 0.7%, and fatalities per 10,000 registrations increased 5.4%.

1990 PRELIMINARY MOTORCYCLE ACCIDENT STATISTICS

		Registrations	Reported Accidents	Accidents Per 10,000 Registrations	Fatalities	Fatalities Per 10,000 Registrations	Fatalities Per 100 Accidents
National							
1990		4,088,297	103,650	253.53	3,172	7.76	3.06
1989		4,218,985	106,261	251.86	3,105	7.36	2.92
State Data - 1990							
Alabama	(1,3,7,9,15,20-22,26,27)	42,939	1,245	289.95	32	7.45	2.57
Alaska	(1,3,7-9,11,16,20-22,26,27)	11,542	143	123.90	10	8.66	6.99
Arizona	(1,3-5,7-12,16,20-22,26,27)	78,876	2,705	342.94	78	9.89	2.88
Arkansas	(1,7,9-11,15,20-22,26,27)	14,537	1,024*	704.41	36	24.76	3.52
California	(1,7-9,11,16,20-22,26,27)	640,745	20,386	318.16	569	8.88	2.79
Colorado	(1,7,8,11,17,20-22,26,27)	108,375	1,824	168.30	68	6.27	3.73
Connecticut	(1,7,8,11,17,20-22,26,27)	46,258	1,346	290.98	49	10.59	3.64
Delaware	(1,3,7,16,20-22,26,27)	6,949	260	374.15	10	14.39	3.85
Dist. of Col.	(1,3,7,11,15,20-22,26,27)	2,500*	362	1,448.00	4	16.00	1.10
Florida	(1,7-10,12,16,20-23,26,27)	195,607	6,584	336.59	214	10.94	3.25
Georgia	(1-4,7,8,11,15,20-22,26,27)	68,764	2,037	296.23	62	9.02	3.04
Hawaii	(1,7,17,20-22,26,27)	12,720	600*	471.70	16	12.58	2.67
Idaho	(1,3,7,9,15,20-22,26,27)	33,602	518	154.16	22	6.55	4.25
Illinois	(1,3,7-10,15,20-23,26,27)	205,449	4,500*	219.03	152*	7.40	3.38
Indiana	(1,7-9,11,17,20-22,26-28)	96,298	2,949	306.24	82	8.52	2.78
Iowa	(1,7,16,20-22,26,27)	133,313	1,575	118.14	37	2.78	2.35
Kansas	(1,7,8,11,16,20-22,26,27)	61,000*	1,066	174.75	35	5.74	3.28
Kentucky	(1,7-9,11,16,20-22,26,27)	31,595	1,132	358.28	38	12.03	3.36
Louisiana	(1,7,9,11,14,20-22,26,27)	71,750	1,000	139.37	45	6.27	4.50
Maine	(1,2,7,16,20-22,26,27)	33,932	667	196.57	19	5.60	2.85
Maryland	(1,7,8,11,18,20-22,26,27)	54,722	1,714	313.22	45	8.22	2.63
Massachusetts	(1,7,17,20-22,26,27)	71,624	1,750	244.33	54	7.54	3.09
Michigan	(1,7,15,20-22,26,27)	134,319	3,189	237.42	82	6.10	2.57
Minnesota	(1,2,7,8,11,16,20-22,26,27)	120,081	1,735	144.49	50	4.16	2.88
Mississippi	(1,7,9,15,20-22,26,27)	12,014	650*	541.04	20*	16.65	3.08
Missouri	(1,7-9,11,16,20-22,26,27)	85,582	1,728	201.91	49	5.73	2.84
Montana	(1,7,8,11,16,20-22,26,27)	21,094	389	184.41	15	7.11	3.86
Nebraska	(1,7,16,20-22,26,27)	22,375	496	221.68	6	2.68	1.21
Nevada	(1-3,7,15,20-22,26,27)	18,445	763	413.66	24	13.01	3.15
New Hampshire	(1,7-10,16,20-23,26,27)	35,802	675*	188.54	18	5.03	2.67
New Jersey	(1,7,9,11,16,20-22,26,27)	78,915	2,255*	285.75	59	7.48	2.62
New Mexico	(1,3,7,11,16,20-22,26,27)	34,166	1,158	338.93	44	12.88	3.80
New York	(1,7,17,20-22,26,27)	187,695	4,720	251.47	136	7.25	2.88
North Carolina	(1,7,16,20-22,26,27)	56,799	2,087	367.44	72	12.68	3.45
North Dakota	(1,3,7,9-11,17,20-22,26,27)	20,113	204	101.43	7	3.48	3.43
Ohio	(1,7,11,14,20-22,26-28)	216,133	4,796	221.90	165	7.63	3.44
Oklahoma	(1,7-10,15,20-22,24,26,27)	61,500*	1,340	217.89	39	6.34	2.91
Oregon	(1,3,7,8,11,16,20-22,26,27)	66,280	578	87.21	27	4.07	4.67
Pennsylvania	(1,7-9,16,20-23,26,27)	163,508	3,369	206.04	107	6.54	3.18
Rhode Island	(1,3,7,9,16,20-23,26,27)	25,945	188	72.46	14	5.40	7.45
South Carolina	(1,7,8,11,16,20-22,26,27)	29,715	1,612	542.49	50	16.83	3.10
South Dakota	(1,7,11,16,20-22,26,27)	23,719	492	207.43	23	9.70	4.67
Tennessee	(1,7-10,16,20-22,24,26,27)	80,299	1,600*	199.26	61	7.60	3.81
Texas	(1,3,7,15,20-22,26,27)	170,642	5,709	334.56	194	11.37	3.40
Utah	(1,3,7-9,16,20-23,26-28)	26,057	956	366.89	19	7.29	1.99
Vermont	(1,7,8,10,11,16,20-22,26,27)	15,199	164	107.90	7	4.61	4.27
Virginia	(1,3,7,11,19-22,26,27)	59,440	1,732	291.39	57	9.59	3.29
Washington	(1,7,9,17,20-23,26,27)	103,301	2,146	207.74	60	5.81	2.80
West Virginia	(1,3,7,15,20-22,26,27)	21,404	567	264.90	16	7.48	2.82
Wisconsin	(1,7,9,16,20-22,26-28)	160,642	2,713	168.88	67	4.17	2.47
Wyoming	(1,7-10,16,20-22,26,27)	14,016	252	179.79	7	4.99	2.78

* Estimated

Footnotes

Registrations: (vehicle types included)
1. Street-legal motorcycles (on-highway and dual purpose)
2. Off-highway motorcycles
3. Mopeds or motorized bicycles (50 cc or less)
4. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
5. Other types of vehicles
6. No description available

Accidents: (vehicle types included)
7. Street-legal motorcycles (on-highway and dual purpose)
8. Off-highway motorcycles
9. Mopeds and motorized bicycles (50 cc or less)
10. 3 or 4-wheeled all-terrain vehicles (sometimes known as ATVs or ATCs)
11. Vehicle types 8, 9 or 10 included **only** if accident or fatality occurs on public roads
12. Other types of vehicles
13. No description available

Criteria for Reporting Accidents:
14. $0-$199 property damage threshold
15. $200-$399 property damage threshold
16. $400-$599 property damage threshold
17. Over $600 property damage threshold
18. When vehicle is towed
19. No description available / other

Accidents include:
20. Motorcycle-related accident where property damage occurs (see reporting criteria above)
21. Motorcycle-related accident where personal injury or fatality occurs
22. Motorcycle-related accidents occurring on public streets/highways
23. Motorcycle-related accidents occurring on nonpublic property
24. Motorcycle-related accidents occurring on public off-highway lands
25. No description available

Fatalities include:
26. Motorcycle operators fatally injured in a motorcycle accident
27. Motorcycle passengers fatally injured in a motorcycle accident
28. Others fatally injured in a motorcycle accident, such as pedestrians, car occupants, bicyclists, etc.
29. No description available

Source: Compiled by Motorcycle Safety Foundation, Irvine, CA., as of July 26, 1991.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS

Each state governs the operation, registration, and licensing of motor vehicles. In general, motorcycles registered for use on public highways are required to meet the equipment requirements in the state in which they are registered. This is in addition to compliance with Federal Motor Vehicle Safety Standards which is required by the motorcycle manufacturers.

The most current state equipment requirements, as of June 1991, are listed below.

STATE MOTORCYCLE EQUIPMENT REQUIREMENTS, JUNE, 1991

	SAFETY HELMET	EYE PROTECTION	REARVIEW MIRROR	BRAKES	HANDLEBAR HEIGHT	PASSENGER SEAT*	PASSENGER FOOTRESTS*	PASSENGER HANDHOLD*	HEADPHONES PROHIBITED	TURN SIGNALS	SPEEDOMETER/ ODOMETER	HEADLIGHT DAYTIME USE	PERIODIC INSPECTION
Alabama	•		•	•-13	•-17	•	•						•-25
Alaska	•-4	•-k	•-11	•-13	•-17	•	•	•	•				•-23
Arizona	•-4	•-j	•	•-12	•-17	•	•	•					
Arkansas	•	•	•	•-12		•	•	•				•	•
California	•-9		•	•-13	•-19	•	•		•-n	•-b		•-i	•-25
Colorado		•	•	•-12		•	•		•-o				•-25
Connecticut	•-4	•-j	•	•-13,g	•-17	•	•					•-e	•-25
Delaware	•-1,7	•	•	•-12	•-17	•	•			•			•
Dist. of Col.	•	•-j	•	•-13	•-17,#	•	•	•			•-20		•
Florida	•	•	•	•-13	•-17	•	•		•-o			•	
Georgia	•	•-j	•	•-12	•-17	•	•		•-q			•	
Hawaii	•-1,4	•-j	•	•-12	•-17	•	•						•
Idaho	•-4		•	•-12		•	•						
Illinois		•	•	•-12	•-19	•	•		•-o			•	
Indiana	•-4	•-4		•-13	•-17	•	•					•	
Iowa			•	•-12	•-17	•	•				•	•-h	
Kansas	•-4	•-j	•	•	•-19	•	•			•-b		•-21	•-25
Kentucky	•	•	•	•-12		•	•						
Louisiana	•	•-j	•-10	•-12	•-17	•	•						•
Maine	•-3		•	•-12	•-19	•	•					•	•
Maryland	•-1,4	•-j	•-11	•-12	•-17	•	•	•-#	•-n		•-#		•-24
Massachusetts	•	•-j	•	•-13	•-17	•	•		•				•
Michigan	•	•-2,j	•	•-13	•-17	•							•-25
Minnesota	•-4,m	•-j	•	•-12	•-19	•	•		•-n			•	•-25
Mississippi	•		•	•-12	•-14,#						•-20,#		•
Missouri	•			•-12	•-17,#								•
Montana	•-4		•	•-13		•	•					•	
Nebraska	•			•-12	•-16	•	•						
Nevada	•	•-j	•-11	•-13	•-17	•	•			•			
New Hampshire	•-4	•-j	•	•-12	•-17	•	•	•-#		•	•-#		•
New Jersey	•-1	•-j	•	•-12	•-19	•	•						•
New Mexico	•-1,4	•-j	•	•-13	•-17	•	•						•-25
New York	•-1	•	•	•-13	•-17	•			•-n	•-a,#	•-20,f	•	•
No. Carolina	•		•	•-12		•	•				•-20	•	•
No. Dakota	•-1,4		•	•-13	•-17	•	•				•		
Ohio	•-4,8	•-j	•	•-12	•-17	•	•		•-n				•-25
Oklahoma	•-4	•-j	•-11	•-13	•-15	•	•				•-20		•
Oregon	•		•	•-12	•-19	•	•			•-b		•	•-25
Pennsylvania	•	•	•-d,#	•-13	•-19	•	•	•			•-#		•
Rhode Island	•-p	•	•	•-12	•-17	•	•	•	•		•-20,a		•
So. Carolina	•-1,6	•-6,j	•	•-13	•-17	•	•					•	•
So. Dakota	•-4	•-j	•	•-12	•-19	•	•						
Tennessee	•	•-j	•	•-12	•-17	•	•					•	
Texas	•		•	•-13	•-17,#	•							•
Utah	•-4		•	•-12	•-19	•	•	•-#			•-22		•
Vermont	•-1	•-j	•	•	•-17	•	•						•
Virginia	•	•-j	•	•-13,c	•-17	•	•		•				•
Washington	•	•-j	•-11	•-13,a	•-17	•	•		•-o			•	•-25
W. Virginia	•-1	•	•	•-12	•-17	•	•					•	•
Wisconsin	•-4,m	•-k	•	•-12	•-18	•	•				•	•	•-25
Wyoming	•-4		•	•-12	•-19	•	•					•	

- • Requirement in law
- • If carrying a passenger

1. Reflectorization
2. Where speeds exceed 35 mph
3. With learner's permit; for 1 yr. after obtaining license; & passengers under 15 yrs.
4. Under 18 years
5. Under 19 years
6. Under 21 years
7. Possession by all, wear under 19 years & by instruction permit holders
8. Novice license holders
9. Effective 1/1/92
10. Left side
11. Left and right side
12. One wheel
13. Both wheels
14. Maximum of 10" above fasten point
15. Maximum of 12" above fasten point
16. Maximum of 15" above fasten point
17. Maximum of 15" above seat
18. Maximum of 30" above seat
19. Handgrips below shoulder height
20. Speedometer
21. For motorcycle manufactured after 1/1/78
22. Odometer
23. Annual emissions inspection
24. Upon transfer of title
25. Random

a. If originally equipped by manufacturer
b. For motorcycle manufactured after 1/1/73
c. For motorcycle manufactured after 7/1/74
d. For motorcycle manufactured after 4/1/77
e. For motorcycle manufactured after 1/1/80
f. For motorcycle manufactured after 9/1/80
g. For 1974 or later model year motorcycle
h. For 1977 or later model year motorcycle
i. Manufacturer requirement for motorcycle manufactured after 1/1/78
j. Except if equipped with windscreen
k. Except if equipped with windscreen 15" or higher
m. Instructional permit holders
n. Prohibited in both ears simultaneously
o. Except helmets with speakers
p. For passengers only
q. Prohibited except for communication
Required by inspection regulations

Many state inspection regulations require that any equipment installed on a motorcycle must function properly even though the equipment is not required by law.

Although this chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Information concerning equipment requirements in Canada can be obtained from the Motorcycle & Moped Industry Council (MMIC) at 7181 Woodbine Ave., Suite 229A, Markham, Ontario, Canada L3R 1A3; (416) 470-6123

Source: Motorcycle Industry Council, Irvine, California

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS

Off-highway motorcycles and all-terrain vehicles are subject to a wide variety of regulations for use in nearly every state. Individual states may have a vehicle registration program, an operator license requirement or specific equipment requirements. Several states are also developing a special off-highway fund through the registration program or gasoline tax rebates based on the amount of fuel used off-highway. This money is then used for the acquisition, development or maintenance of off-highway vehicle use facilities.

The chart below summarizes the requirements of each state for vehicles and operators as of June, 1991. The requirements specified below do not necessarily apply to ATVs. For information on ATV requirements contact the Specialty Vehicle Institute of America at the address on page 44.

STATE OFF-HIGHWAY MOTORCYCLE REQUIREMENTS, JUNE, 1991

MOTORCYCLE USAGE

State	Off-Highway Registration	Vehicle Title	Operator License	Minimum Age To Operate	Lic	Off-Highway Equipment Requirements: Brakes	Muffler	Spark Arrester	Other	Rider Education	State OHM Funding	OHV Advisory Council	Total Motorcycles Used Off-Highway At Some Time In 1990
Alabama													96,100
Alaska				14BH									32,000
Arizona		•					•-f			X	•-m	Yes	63,800
Arkansas												Yes	99,000
California	•-Ad	•			•-K	•	•-Mf	•-N		X	•-T	Yes	443,200
Colorado	•-neo				•-Kjo	•-fo	•-Mf	•-fo			•-S		54,900
Connecticut	•-Ed				•	•	•						31,900
Delaware	•-Dd			12B	•-K	•	•-Mf	•	•-O	X	•-S		8,100
Dist. of Col.		•											100
Florida	•-EeH												140,000
Georgia						•	•						124,000
Hawaii													N/A
Idaho	•-e	•-k					•-M			X	•-T	Yes	43,900
Illinois													93,400
Indiana	•-jDe	•-l		14B		•-L	•				•-S		81,800
Iowa													43,900
Kansas													31,600
Kentucky							•						60,900
Louisiana	•-d	•											89,300
Maine	•-Fe				•-Kf		•-Mf	•	•-W	•-C	•-S		29,300
Maryland	•-eH		•-BH	12H	•-KH	•-H	•-MH				•-S		44,200
Massachusetts	•-Ee			12, 14B, 10g	•	•	•-M	•	•-O				50,900
Michigan	•-Fe	•		16B & a	•-K	•-L	•-Mf	•	•-P	•-o	•-S	Yes	167,600
Minnesota		•-l											85,400
Mississippi		•-l											61,100
Missouri		•											88,600
Montana	•-d	•-j									•-S		30,200
Nebraska													31,700
Nevada		•-l						•					25,000
New Hampshire	•-De		•-CB or a	18B, b or J	•-K	•-L	•-M	•	•-Y	•-GB or b	•-U	Yes	27,200
New Jersey													66,300
New Mexico	•-Ed	•											27,900
New York	•-Fd			16B, 10h	•-Kf	•	•-Mf	•-N	•-O	•-c	•-S		146,800
No. Carolina													108,200
No. Dakota							•-MH						15,100
Ohio	•-Eo		•-j	16B, 12i	•	•	•				•-S		134,300
Oklahoma					•-KH		•-H	•-H	•-OH			Yes	57,800
Oregon	•-Ed	•			•-K	•	•-M	•-H			•-T	Yes	72,500
Pennsylvania							•-H	•-NH					164,600
Rhode Island	•-Ee	•		12, 16BH	•-K	•	•-Mf		•-Q				7,100
So. Carolina		•-l											40,700
So. Dakota		•					•						15,800
Tennessee		•					•-H	•-H	•-PH				110,700
Texas		•					•-H	•-NH	•-OH				222,100
Utah	•-jEd	•-Z	•-a	8j, 16a	•-K	•	•		•-R	•-b	•-T	Yes	59,700
Vermont	•-jEd			12B	•-f	•-f	•-Mf						12,200
Virginia													76,700
Washington	•-Dd				•-K	•	•-M	•		X	•-T	Yes	86,000
W. Virginia													59,100
Wisconsin											•-V	Yes	76,400
Wyoming													16,900
U.S. TOTAL													3,756,000

• Requirement in Law

A. Except street-registered OHMs. Identification sticker required to transport competition OHM.
B. Unless supervised.
C. Under age 18.
D. Except street-registered OHMs or OHMs in races.
E. Except street-registered OHMs.
F. Except OHMs in races.
G. For ages 12-17.
H. Applies only on certain state lands.
I. Only if lien exists.
J. Unless at least age 12 & have safety certificate.
K. Night operation only.
L. Specific performance requirements.
M. Decibel sound limit specified.
N. Approved by U.S. Forest Service.
O. Approved helmet.
P. Helmet and eye protection.
Q. 16 sq. in. reflective material each side of OHM and approved helmet.
R. Approved helmet in competitive events or if under 18.
S. Registration and other fees.
T. Fees and gasoline tax allocation.
U. Registration and other fees. Gas tax refund for off-highway use.
V. Special appropriations.
W. Approved helmet if under 18.
X. Safety education & info program available.
Y. Helmet and eye protection if under 18.
Z. For 1988 model year or newer.
a. Unless in possession of safety certificate.
b. Unless operator's license possessed.
c. Ages 10-15 unless supervised.
d. By Motor Vehicle Registration Agency.
e. By Recreation Management Agency.
f. Except in authorized competitive events.
g. In authorized events.
h. With safety certificate.
i. On DNR lands if accompanied by parent.
j. On public lands.
k. Beginning 1/1/91, for transfer of ownership.
m. Legislative appropriation & OHV gas tax allocation.
n. Except OHMs used only for agriculture or in authorized events.
o. Under age 16.

OHM SOUND LEVEL LIMITS	TEST PROCEDURES
CA Manufactured before 1973 92 dBA; 73-74 88 dBA; 75-85 86 dBA, after 85 82 dBA; or 101 dBA.	a,d
CO Manufactured 1971-72 86 dBA; 73 and after 84 dBA; different local limits also permitted.	a
DE Manufactured 1978 and after 88 dBA or EPA limit	b
ID 92 dBA.	c
MD Manufactured after 6/76 86 dBA; 79 and after 84 dBA.	a
MA 103 dBA.	d
ME Must meet Federal EPA Standards.	
MI Model year 1983 and after — EPA limit; additional limits specified in law.	
NH Manufactured 1973-74 88 dBA, 75-82 86 dBA, after 82 EPA limit	a
NY Must meet Federal EPA Standards	
ND 85 dBA.	a
OR In use: model year 1975 and before 102dBA, after 1975 99dBA. Certification: 1977-82 models 81dBA; 83-87 78dBA; 87 and after 75dBA. Racing: 105dBA.	d,a,d

TEST PROCEDURES	
RI Manufactured after 5/72 82 dBA; after 5/74 73 dBA.	a
VT 82 dBA.	e
WA 86 dBA or 105 dBA.	a,d

TEST PROCEDURE

a Acceleration test 50 feet incorporating SAE J331a or similar test method
b Passby test 50 feet
c Passby test 20 feet
d Stationary test 20 inches
e Measured at 50 feet. Test procedure not prescribed.

Although the chart represents information from the most authoritative sources available as of the date shown above, the Motorcycle Industry Council is not responsible for accuracy or completeness.

Source: Motorcycle Industry Council, Inc., Irvine, California

The Motorcycle Owner

NUMBER OF OWNERS AND RIDERS, OWNER'S SEX, MARITAL STATUS, AGE, EDUCATION

It is estimated that the 7.3 million motorcycles, scooters and ATVs in use were owned by 5.8 million owners in 1990. Based on 1990 consumer research, these vehicles were operated by 7.5 million riders in households owning these vehicles and another 23 million riders in households not owning these vehicles in 1990.

1990 consumer research indicates that 93% of the owners were male and 7% were female, and over half were married. The average owner age was 31 in 1990 compared to 28 in 1985.

High school was the highest level of education attended by about half (51%) of the owners, and two fifths (40%) had achieved some college or post graduate education in 1990.

MOTORCYCLE OWNER PROFILE: NUMBER OF OWNERS AND RIDERS, SEX, MARITAL STATUS, AGE, EDUCATION

5,800,000 Estimated Motorcycle, Scooter, and ATV Owners in 1990
7,506,000 Estimated Riders in 1990 in Households Owning These Vehicles
23,064,000 Estimated Riders in 1990 in Households Not Owning These Vehicles

THE MOTORCYCLE OWNER

Sex	% of Total Owners		
	'90	'85	'80
Male	92.7%	91.3%	92.1%
Female	7.3%	8.7%	7.9%

Marital Status	% of Total Owners		
	'90	'85	'80
Single	41.4%	47.7%	51.7%
Married	56.3%	50.2%	44.3%
Not Stated	2.3%	2.1%	4.0%

Age	% of Total Owners		
	'90	'85	'80
Under 18	11.1%	16.6%	24.6%
18-24	15.6%	20.2%	24.3%
25-29	16.0%	18.6%	14.2%
30-34	15.8%	13.6%	10.2%
35-39	13.7%	8.7%	8.8%
40-49	15.0%	12.5%	9.4%
50 and Over	10.6%	7.9%	5.7%
Not Stated	2.2%	1.9%	2.8%
Median Age	31.0 yrs.	27.7 yrs.	24.0 yrs.
Mean Age	32.6 yrs.	29.7 yrs.	26.9 yrs.

Highest Level of Education	% of Total Owners		
	'90	'85	'80
Grade School	7.5%	8.6%	13.5%
Some High School	11.2%	16.0%	18.9%
High School Graduate	39.3%	36.5%	34.6%
Some College	23.1%	20.4%	17.6%
College Graduate	11.7%	12.0%	9.2%
Post Graduate	4.7%	4.8%	3.1%
Not Stated	2.5%	1.7%	3.1%

Note: The owner is defined as the primary rider, and the rider is the operator, not the passenger of the vehicle.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1986.
1990 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February 1991.

OWNER OCCUPATION, INCOME, HOBBIES, AND MOTORCYCLE OWNERSHIP

Of the owners employed in 1990, 24% were laborers or semi-skilled laborers, another 19% held professional or technical positions, and another 12% were mechanics or craftsmen.

In 1990 about 22% of all owners were students, compared with 29% in 1985.

Of the owners indicating their household income for the prior year, the average income for 1989 was $33,200 compared to $25,900 for 1985.

The average motorcycle owner has owned three motorcycles. Their most commonly cited hobbies are fishing (32%), hunting (25%) and camping (13%).

OWNER PROFILE: OCCUPATION, INCOME, HOBBIES, MOTORCYCLE OWNERSHIP

Occupation of Owner	% of Total Owners*		
	'90	'85	'80
Laborer/Semi-Skilled	23.8%	22.2%	20.7%
Professional/Technical	19.2%	18.3%	18.8%
Mechanic/Craftsman	12.2%	14.7%	23.3%
Manager/Proprietor	9.4%	9.1%	8.6%
Clerical/Sales	6.5%	8.1%	9.3%
Service Worker	6.8%	6.4%	7.1%
Farmer/Farm Laborer	4.2%	6.4%	4.6%
Military	1.4%	1.6%	1.9%
Other	13.3%	4.6%	0.0%
Not Stated	3.2%	8.6%	5.7%

*Based on owners employed.

Household Income for Prior Year	% of Total Owners		
	'90	'85	'80
Under $10,000	3.3%	10.6%	9.1%
$10,000-$14,999	4.2%	9.0%	13.0%
$15,000-$19,999	7.8%	11.2%	13.9%
$20,000-$24,999	10.6%	8.5%	12.9%
$25,000-$34,999	21.1%	17.8%	12.5%
$35,000-$49,999	19.8%	13.9%	5.9%
$50,000 and Over	19.7%	6.8%	2.4%
Don't Know	13.5%	22.2%	30.3%
Median	$33,200	$25,900	$17,500

Other Recreational Interests/Hobbies	% of Total Owners		
	'90	'85	'80
Fishing	32.3%	31.2%	N/A
Hunting	24.9%	24.8%	N/A
Camping	12.8%	12.4%	N/A
Water Sports	11.0%	13.7%	N/A
Boating/Sailing	10.5%	9.5%	N/A
Snow Skiing	8.1%	8.8%	N/A

Total Motorcycles** Ever Owned	% of Total Owners		
	'90	'85	'80
1	28.5%	22.4%	25.6%
2	19.4%	20.1%	21.4%
3-4	24.1%	26.8%	26.5%
5-9	17.5%	18.5%	16.0%
10 or More	10.0%	11.0%	7.6%
Not Stated	0.5%	1.2%	2.9%
Median (cycles)	3.0	3.0	3.0

**Scooters and ATVs not included.

Note: The owner is defined as the primary rider.

Source: 1980 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, April 1981.
1985 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February, 1986.
1990 Survey of Motorcycle Ownership and Usage, conducted for the Motorcycle Industry Council by Burke Marketing Research, Inc., Cincinnati, Ohio, February, 1990.

OTHER NATIONAL MOTORCYCLE ORGANIZATIONS

MOTORCYCLE SAFETY FOUNDATION

National Headquarters
2 Jenner Street, Suite 150
Irvine, California 92718-3812
(714) 727-3227

The Motorcycle Safety Foundation (MSF) was organized in 1973 to promote the safe use of motorcycles on the nation's public streets and highways. The MSF cooperates with the National Highway Traffic Safety Administration, state governments and other safety organizations to promote programs and materials to upgrade motorcycle operator education, and motorcycle testing and licensing procedures. Over 3,800 MSF Certified Instructors teach rider education at 855 sites. Locations are available by calling 1-800-447-4700. The MSF has developed numerous publications, research studies and films on motorcycle safety and maintains contact with the media to increase motorcycle safety awareness.

SPECIALTY VEHICLE INSTITUTE OF AMERICA

2 Jenner Street, Suite 150
Irvine, California 92718-3812
(714) 727-3727

The Specialty Vehicle Institute of America (SVIA) was formed in 1983 to foster and promote the safe and responsible use of specialty vehicles manufactured or distributed in the United States. The SVIA has developed and implemented a national ATV rider-safety training program. SVIA continues to monitor ATV voluntary standards, promote responsible ATV legislation, and serve as a liaison with state and Federal agencies on environmental issues.

MOTORCYCLE RIDERS FOUNDATION

P.O. Box 1808
Washington, D.C. 20013-1808
(202) 546-0983
Membership Information: (612) 522-8024
or 1-800-845-9714

The Motorcycle Riders Foundation, founded in 1987, is a Washington, D.C. based grassroots motorcyclist organization. The MRF is supported by State Motorcyclist Rights Organizations and through individual memberships. The MRF publishes a quarterly journal and a quarterly information bulletin. The MRF sponsors an annual national educational seminar for motorcyclist rights activists. The MRF works on the Federal and state levels to protect the rights and interests of motorcyclists.

ATV SAFETY INSTITUTE

A Division of the Specialty Vehicle Institute of America
2 Jenner Street, Suite 150
Irvine, California 92718-3812
(714) 727-3727

The ATV Safety Institute (ASI), a division of the Specialty Vehicle Institute of America, was formed in 1988 to implement an expanded national program of all-terrain vehicle (ATV) safety education and awareness, based on SVIA safety programs developed since 1983. The ASI also offers an extensive array of safety publications to promote the safe and responsible use of ATVs. Information on the ATV Rider-Course and other ASI safety programs is available by calling 1-800-447-4700.

AMERICAN MOTORCYCLIST ASSOCIATION

P.O. Box 6114
33 Collegeview Road
Westerville, Ohio 43081-6114
(614) 891-2425
Membership Information 1-800-AMA-JOIN
FAX (614) 891-5012

The American Motorcyclist Association, founded in 1924, is a voluntary membership organization for individuals who own and ride motorcycles. With a membership of over 185,000, the AMA has approximately 1,100 chartered clubs throughout the nation. The AMA sanctions over 4,000 amateur and professional events per year for the off-road and road-riding enthusiast. The AMA also sponsors programs and contests to encourage involvement by motorcyclists in charitable work and community service. The AMA works with various government agencies and private organizations to promote and protect the interest of the American motorcyclist.

STATE MOTORCYCLE SAFETY ADMINISTRATORS

P.O. Box 47
Ocean View, Delaware 19970
(302) 855-3484

The National Association of State Motorcycle Safety Administrators is a membership association organized to foster and promote state administered motorcycle safety programs and to represent state concerns relating to motorcycle safety. The SMSA gives technical assistance to states already having or seeking state funded motorcycle safety legislation and provides it members with training and information concerning motorcycle safety programs administration.

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While this information is thought to be the most accurate available at the date of publication, the Motorcycle Industry Council assumes no responsibility for accuracy or completeness.

Additions and corrections are solicited for future publications.

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